

Edition 2.2

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AQLnet User Guide

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Updates

Sirius Concepts reserve the right to revise this publication and make changes from time to time in content.

This is not a controlled document. It is the responsibility of the licensee to ensure that their user manual is up to date. Updates can be downloaded from AQL Web Resources.

Client Engagement

This manual sets out how AQLnet functions and options available to users. The context in which it used – the protocols and guidelines surrounding its use in providing client services are not covered.

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Introduction

AQLnet is a system to help professionals deliver advice and support to their clients. The system allows a detailed action plan to be created from an assessment against a set of specialist questions and/or from a SWOT Analysis. A library of Questions Sets provides general business developments reviews while a Question Set builder enables experts to create Question Sets in their speciality.

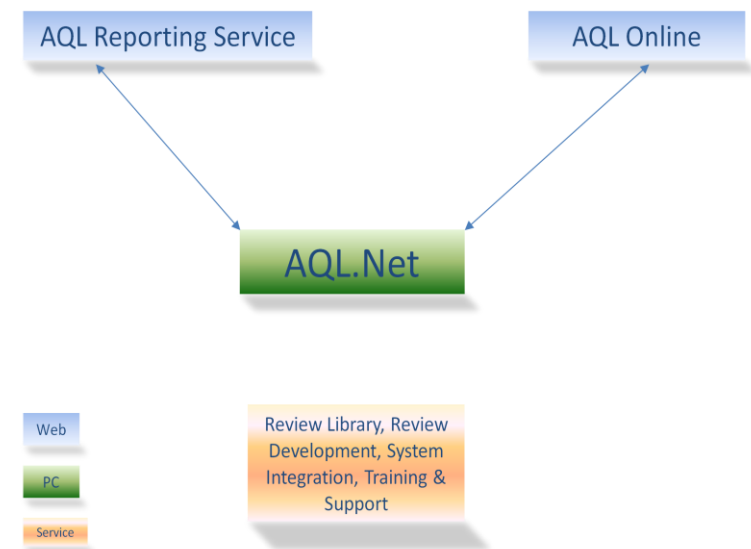
AQLnet can be used as a support tool by individual advisers and consultants to deliver a high quality service to their clients and to manage their work portfolio. For consulting organisations AQLnet provides a common approach to service provision while retaining the individual strengths of their advisory team.

With reports in Word format and integration into Microsoft Office applications AQLnet is the ideal business professionals support application.

AQL Product Integration

AQLnet can be combined with the web based AQL Reporting Service to provide monitoring, reporting and analysis on all the advisory services provided by a consultancy or economic development agency.

For a fully comprehensive service offering AQLnet can be linked with AQL Online , a web based self assessment and action planning service, which allows clients to undertake a basic review before an in depth engagement with an adviser.



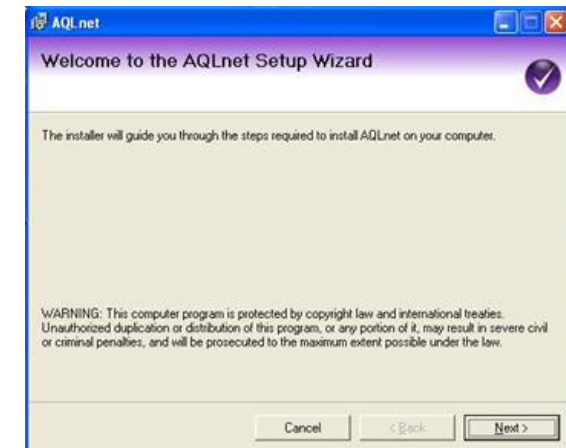
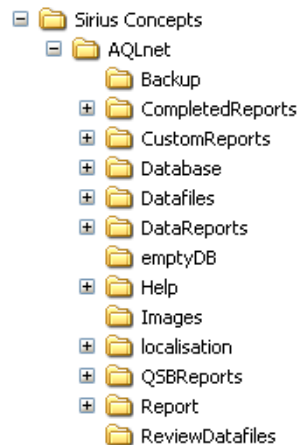
i. Installing AQLnet

Run the installation package to place the AQLnet shortcut  on the PC desktop.

AQLnet requires Microsoft's .Net framework, the PC will be automatically checked for this software, if it is not found it will be downloaded and installed from a Microsoft site.

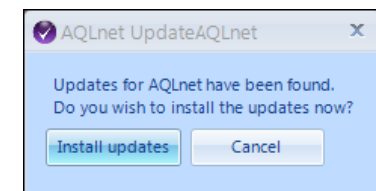
Installation folders

The following folders are placed in the default installation location of 'Program Files'.



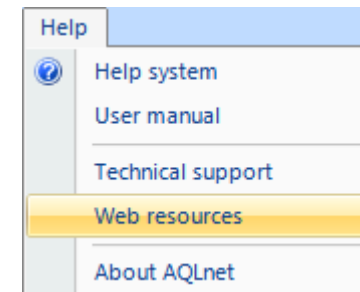
Updates

Users with a support contract will receive free updates. The software will periodically check for the latest version. When a new update is found a message will be displayed before the update is applied.



i. Learning AQLnet

Use this manual and the online Help system to learn AQLnet. An example organisation, New World Services Ltd, is included which can be used for practice and experimentation. Useful information, including tutorials, may also be found on the Sirius web site. Access these pages through the Web resources option on the menu bar.



Downloads

- [AQLnet Software and Report Version Information](#)
- [AQLnet User Manual Edition 2.1](#)

User Forum

Share ideas and experiences with other AQLnet users.

[Linked In](#)
Join the AQL Group

Tutorials

AQLnet

- Lesson 1 - Getting Started
- Lesson 2 - Financials I
- Lesson 3 - Financials II
- Lesson 4 - Review Assessment
- Lesson 5 - Recording Issues
- Lesson 6 - Add Review Action
- Lesson 7 - Reports

Question Set Builder

- Lesson 1 - Adding a question set
- Lesson 2 - Adding areas and categories
- Lesson 3 - Adding questions

Question Set Examples

The following are examples of the different sectors in which AQLnet can be used. You may download and amend these examples for your own use.

- [Balanced Scorecard Review](#)
- [Financial Management Essentials](#)
- [Operational Essentials](#)
- [Strategy Essentials](#)
- [Workforce Development Review](#)

To add an example to your AQLnet:

1. Click a Question Set Example above.
2. Click the "Run" buttons, then click the "Unzip" button, and then click the "OK" and "Close" buttons.
3. Then use the Question Set Builder toolbar option "File/Import Question Set".

Click the Adobe Reader graphic to download Adobe PDF file reader if required.

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Part I: Using AQLnet

How to carry out assessments, identify issues and create actions plans

Part II: Set up and Question Set Creation

How to configure AQLnet and make you own specialist question sets

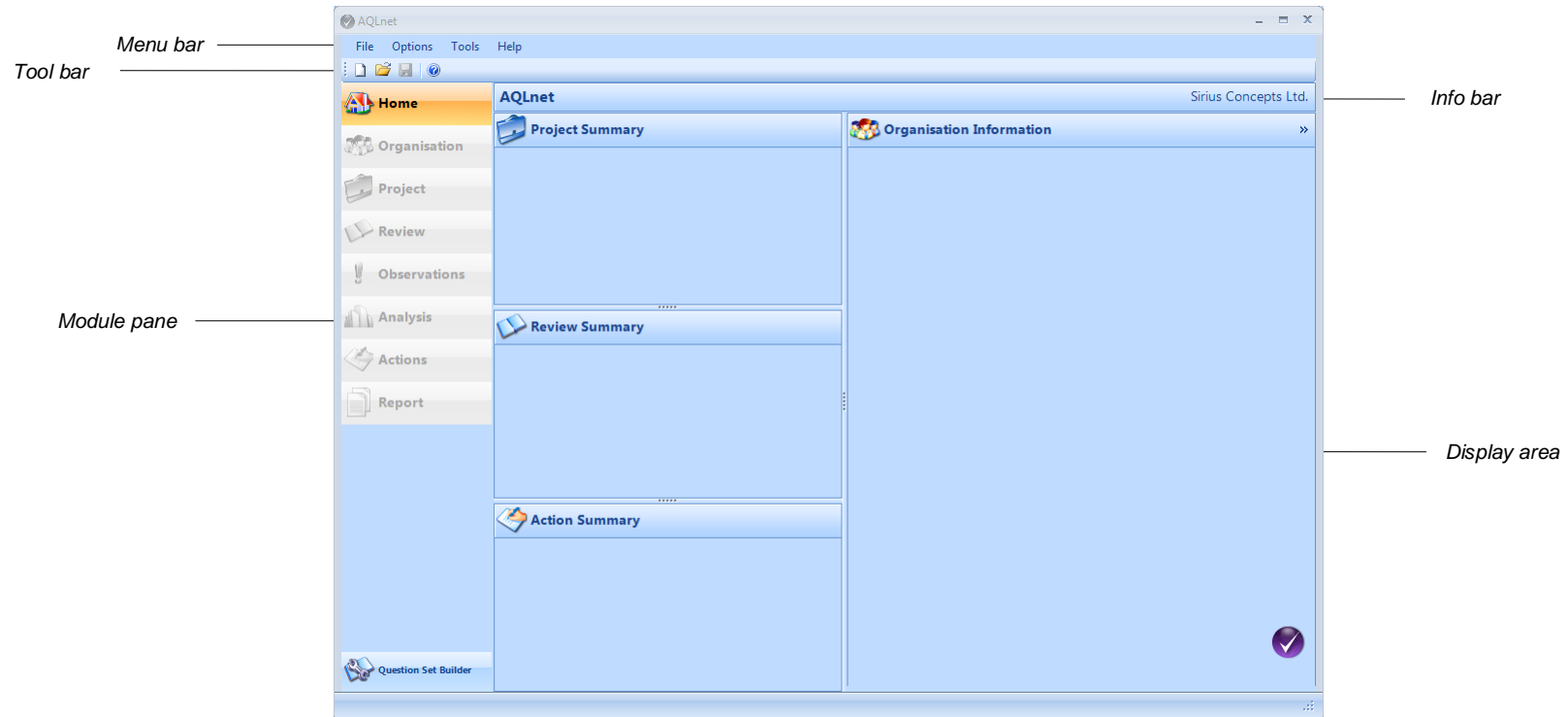
Part III: Integration with AQL Reporting Services and AQL Online

How to use AQLnet as part of management system for service delivery

Part I: Using AQLnet

1. Working with AQLnet





The view when AQLnet is started.



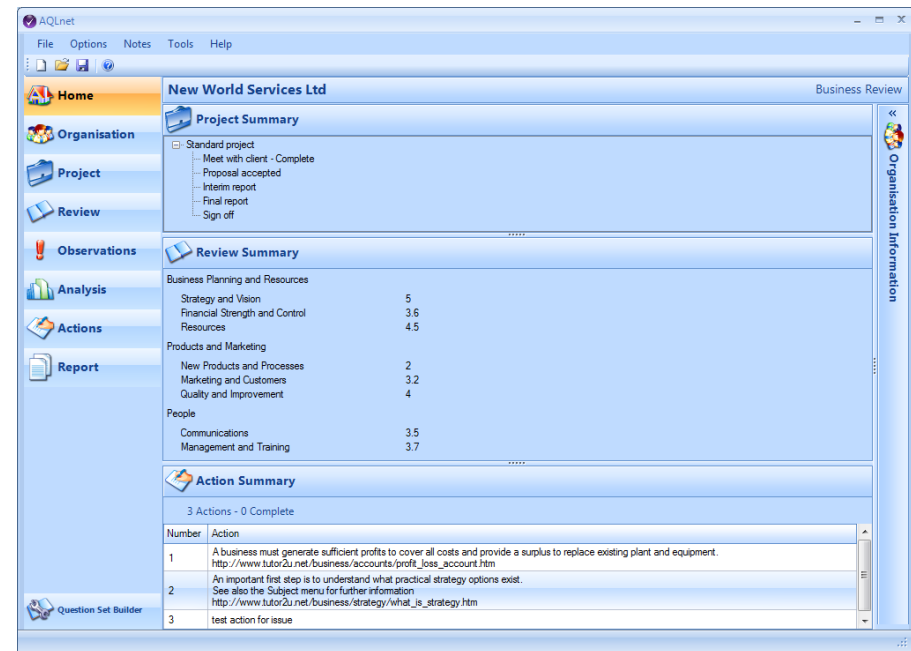
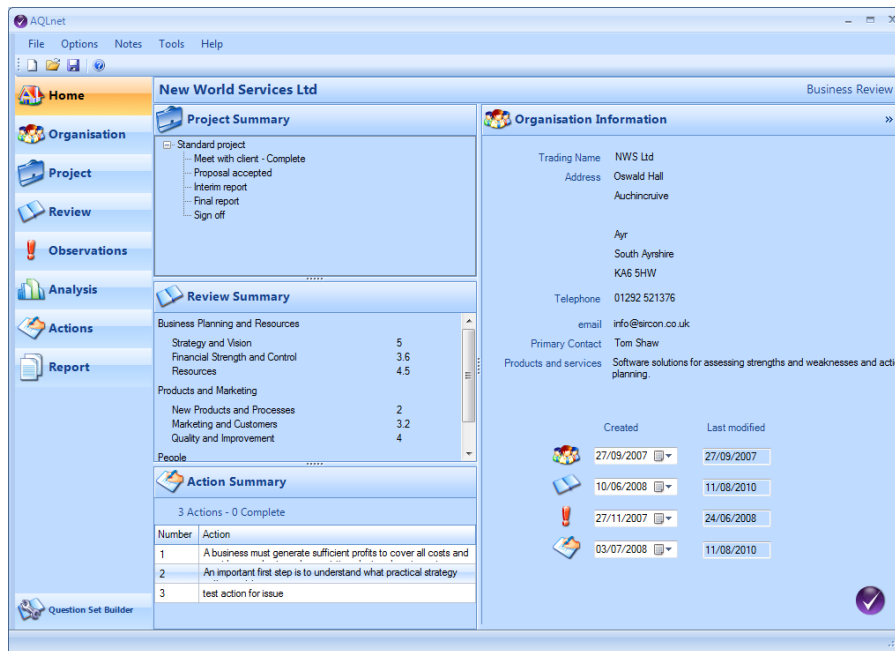
The AQLnet interface is made up of five sections:

- Menu bar - execute commands and access dialog boxes
- Tool bar - a collection of buttons that use shortcuts to commonly used menu commands
- Module pane - access to the major modules of AQLnet
- Info bar - displays the name of current organisation and question set
- Display area - display and work area for the selected module

When working with an organisation the Home display summaries the current position.

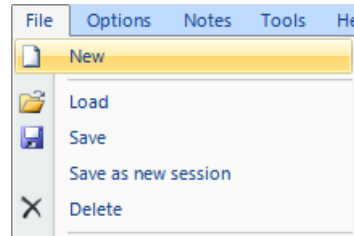
	Project Summary	Project milestones and their status
	Review Summary	Average score for each question set category
	Action Summary	Entries in the action plan
	Organisation	Contact information and last modification date


Within the display area the size of each section may be adjusted to give the best display by moving the screen splitters .

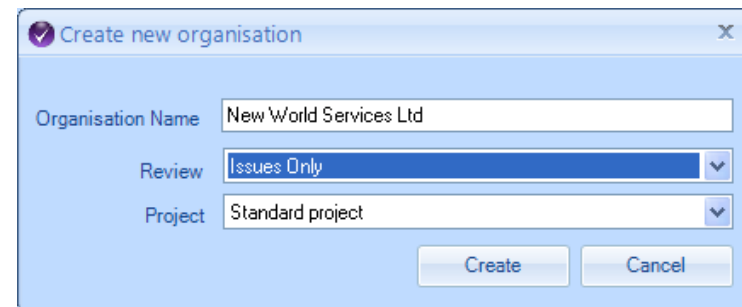
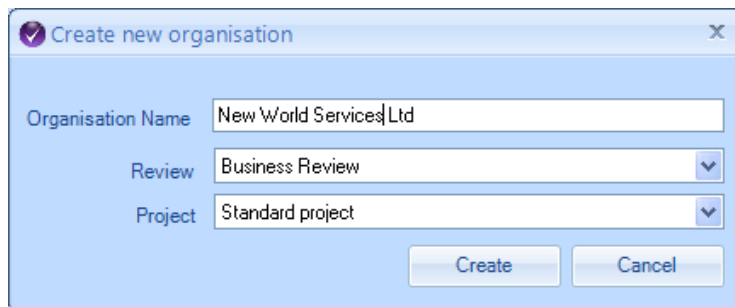


2. Entering a new organisation


To enter a new organisation select



or click  from the Tool bar. In the displayed dialogue window type the name of the organisation, from the Review drop down select the set of questions to be answered and the project being undertaken. To record only issues and ignore review questions select Issues Only in the review selection box.

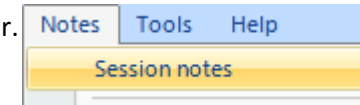


Click  to confirm organisation name and selected set of questions.


Click  to record data about this organisation.

2.1 Notes

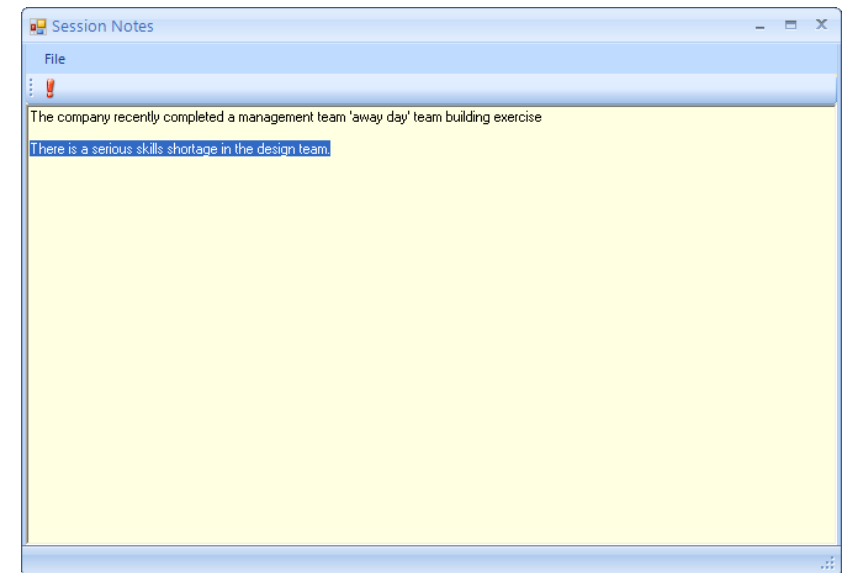
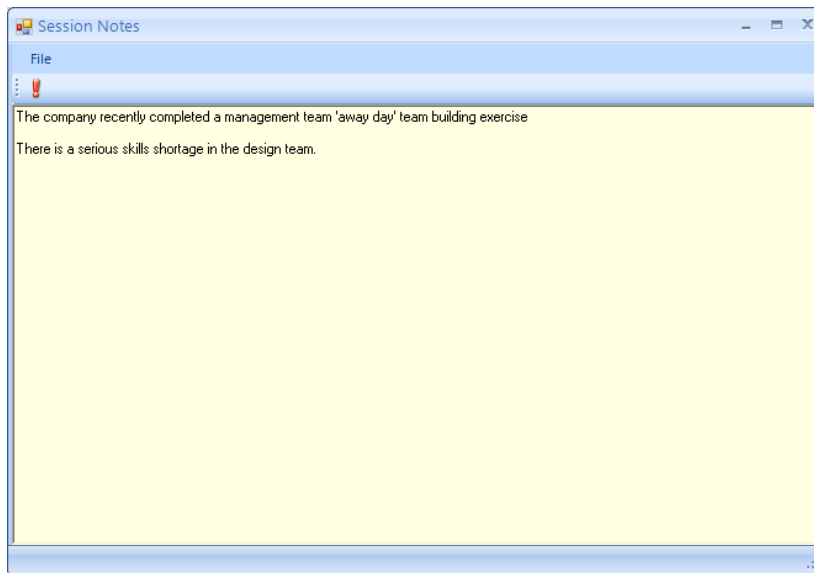
General notes on an organisation can be recorded at anytime using the Session Notes option on the menu bar.



The notes recorded here are not specific to any module of AQLnet, however any note may be identified as an issue and will be added to the Issue module. (see section 6)

To identify a note as an issue highlight the text then click . The text is added to the Observations module as an unclassified issue.

(Once a note has been identified as an issue it will remain in the Observations module even if the note text is deleted.)



2.2 Executive Summary

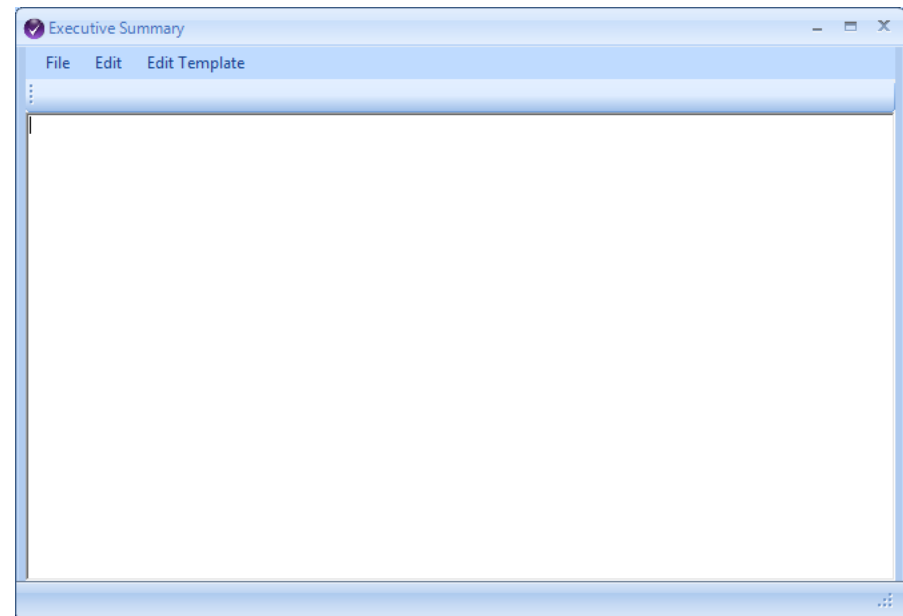
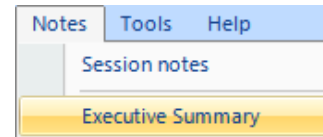
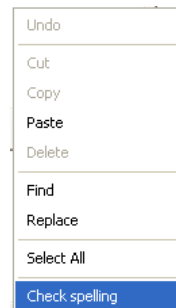
The Executive summary is a special note for use in client reporting.

Text entered here is automatically included in all reports with an executive summary section.

To create a pro forma summary click on the Edit Template. The template text is shown for each new organisation but may be edited in the usual way.

2.3 Spell checker

To check the spelling of entered text click into the text box and do a right mouse click. From the displayed options select Check spelling.



3. Organisation



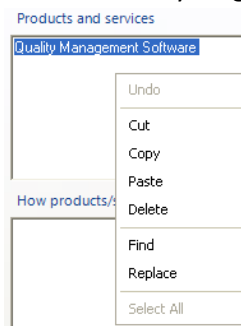
The organisation module is used to record details on the client. There are six fixed tabs. An eighth tab for custom fields may be created, see section 13.1.6.

3.1 General tab

Under the General tab contact information on the organisation can be recorded. For drop down options the items in the list may be modified using the setting option (see 10.2). Underlined text labels indicate a hyperlink to an information web site. The organisation may be classified using the SIC finder. This Standard Industry Classification Code uses the UK DTI classification system. For a custom classification use the Sectors option.

3.2 Business tab

The Business tab is used to record information on eight key indicators. Text recorded here may be copied/pasted from/to other applications. To copy text from any part of AQLnet click into the text box followed by a right mouse click to display the edit options.



AQLnet - New World Services Ltd

General | Business | Management | Adviser | Financial | Exporting | Intellectual Property

Organisation name: New World Services Ltd
 Trading name: NWS Ltd
 Address line 1: Oswald Hall
 Address line 2: Auchincruive
 Address line 3:
 Town/City: Ayr
 County: South Ayrshire
 Postcode: KA6 5HW
 Telephone: 01292 521376
 Fax: 01292 525939
 Email: info@aircon.co.uk
 Website: www.aircon.co.uk
 CRM ID:
 Date registered: 27/09/2007

Active ☒ Include in benchmark ☒
 Business Registration Number:
 Year end month: May
 Year established: 1995 Number of years trading: 15
 Number of employees: 12
 Type of organisation: Private limited company
 Controlled by: Management
 Local ownership ☒
 Data Protection Act
 Direct contact allowed ☒
 Organisation name disclosure ☒

SIC: 72.20
 Selection 1: Services
 Selection 2: Computer Services
 Selection 3: Computer Software consultancy and supply

Sectors: Software and Computer Services Business to Business (B2B)
 Sectors: Aerospace (Civil)

AQLnet - New World Services Ltd

General | Business | Management | Adviser | Financial | Exporting | Intellectual Property

Products and services: Software solutions for assessing strengths and weaknesses and action planning.
 Purchasers/end users of product or service: Client support, Start up agencies
 How products/services are sold: License and Distributor
 Main competitors: In-house developers, Atex Software, Illuminat Ltd
 Key markets: ED/As and Consultancy firms. Education - schools, education authorities and FE colleges.
 Competitive strengths: Develop own products. Work closely with customers to develop new specifications.
 Unique selling points:
 Trademarks and Intellectual Property:
 Range and integration or products:

3.3 Management tab

This section is used to record the management team of the organisation. The right hand side of the display shows the team members. The left hand side has the edit panel where new member can be added, existing members removed or details amended. To add a new member click

New

To indicate the primary contact click on Primary contact ☐

To send an email, select the contact and click on Send email

To add contact to Outlook, select the click on Add to Outlook contacts

3.4 Adviser tab

This tab is used to record details on advisers who are involved in providing assistance to the organisation. Adviser notes and prior contact details may be added.

To indicate the lead adviser click on Lead Adviser ☐

To send an email, select the adviser and click on Send email

To add adviser to Outlook address book click on Add to Outlook contacts

3.5 Financial tab

The Financial tab is used to gauge the basic financial status of an organisation and to measure the economic impact of the organisation on the local economy by measuring gross value added (GVA).

To added data for a new year click

New

Key Ratios and GVA are shown in the right hand display area. The definition of terms used in the Financial tab is shown in Table 1.

AQLnet
File Options Notes Tools Help

New World Services Ltd Business Review

General Business Management Adviser Financial Exporting Intellectual Property

Organisation

Data Entry
New
Year: 2005
Total sales £: 550 000
Export sales £: 10 000

Net profit before tax £: 75 000
Total employment cost £: 350 000
Depreciation £: 25 000
Interest paid/received £: 8 000
Shareholders funds/equity £: 200 000
Current assets £: 180 000
Current liabilities £: 78 000
Borrowings - loans and overdraft £: 15 000
Average employees during Year (FTE): 20
Source of information: Management
Type of assistance: Other

Sales
Year: 2005
Total sales: 550
Export sales: 10
Export %: 1.8

Gross Value Added
Net profit before tax: 75
Total employment cost: 350
Depreciation: 25
Interest paid/received: 8
Gross Value Added (GVA): 458.0
GVA % of sales: 83.3
Average employees during year: 20
GVA per employee: 22.9

Key Ratios
Profitability %: 13.6
Current assets: 180
Current liabilities: 78
Liquidity ratio: 2.3
Borrowings - Loans and overdraft: 15
Shareholders funds/equity: 200
Gearing: 0.1

Chart options
Sales
Net profit
GVA
Show comparison

Question Set Builder

Last Year Proactive %: This is the % of total sales that arose from proactive exporting. This value cannot be greater than the export % and if it exceeds 10% of the total sales the organisation is not a new exporter	Total Employment Costs: This includes wages, salaries, directors' drawings, NI contributions (employment taxes) and pension costs
Depreciation : Depreciation of intangible assets may be referred to as amortisation	Interest paid/ (received): Net any interest paid and received. Net interest received is entered with a minus (-)
Gross Value Added: This is the sum of Net Profit before Tax, Total Employment Costs, Depreciation and Interest paid/ (received). It is the impact that the business has on the economy	Average Employees during the year (FTE): FTE stands for Full Time Equivalents. Part time employees count as part of a FTE employee, i.e. someone who works for half a week is 0.5 FTE
GVA per employee: This is a key measure of productivity. Benchmark values can be obtained by using the "Domestic and international benchmarks" hyperlink. High GVA per employee values indicate that the business exploits its intangibles and is a strong indicator of international competitiveness.	Profitability: This is ratio of net profit before tax to total sales. Strong profitability ensures that organisations generates the money that it needs to invest in growth and to repay borrowings
Current Assets: This value will be shown on the balance sheet. It is the total of stocks, debtors and any cash. These are the assets in the business that are either cash or will become cash in the relatively short term	Current Liabilities: This value is shown on the balance sheet as "Creditors amounts falling due within one year". It is trade and other creditors, overdrafts and any loan repayments due within twelve months. These are the liabilities that will have to be settled in the relatively short term
Liquidity Ratio: This is the ratio of current assets to current liabilities. If this is less than one then the liabilities that have to be settled in the short term are greater than the cash that will be available. In these circumstances there is a distinct possibility that the business will be experiencing cash flow difficulties and that the time of key people will be taken up from day to day in dealing with this	Borrowings loans and overdrafts: This will have to be calculated from the balance sheet and supporting notes. Loan repayments due within 12 months and overdrafts will be included in "Creditors amounts falling due within one year" and remaining loans will be included in "Creditors amounts falling due after more than one year"
Shareholders funds/equity: This will be shown on the balance sheet. In almost all cases this will be the balance sheet total that is used to assess SME status	New exporter: A new exporter is defined as a company having a proactive export turnover not exceeding 10% of total sales and a total export turnover not exceeding 25%
SME: SME status is based on employment, sales and balance sheet total. Loss of SME status only occurs if the thresholds are exceeded over two consecutive financial years	SME Employment: An SME employs less than 250. Students, apprentices and people on maternity leave may be excluded from the headcount
SME Sales : An SME has annual sales of less than 50m euros (£33m)	SME Balance Sheet: An SME has a balance sheet total less than 43m euros (£28m)
Type of assistance: This indicated the intensity of government support	

Table 1: Financial definition of terms

With data for more than one year recorded a comparison between years can be made.

Click on **Show chart** then select the years to be compared

Selected	Comparison
2005	2004

The percentage difference between the selected year and the comparison year is shown in the column headed **+/- %**

Selected year eligibility	
New exporter	<input checked="" type="checkbox"/>
SME	<input type="checkbox"/>
Employment	<input type="checkbox"/>
Sales	<input type="checkbox"/>
Balance sheet	<input type="checkbox"/>

The Selected year eligibility panel provides check boxes to record whether the organisation meets the definition of an SME based on employment, sales and balance sheet, and if it is a new exporter or not.

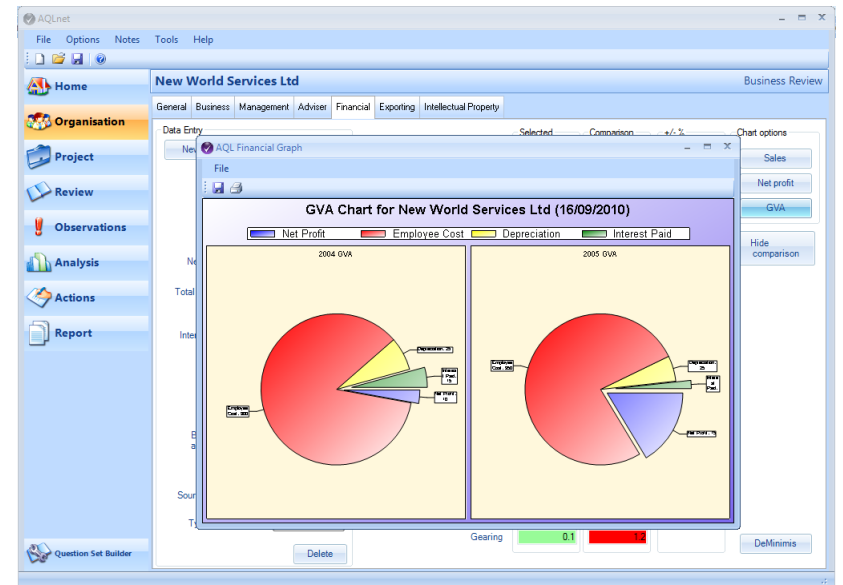
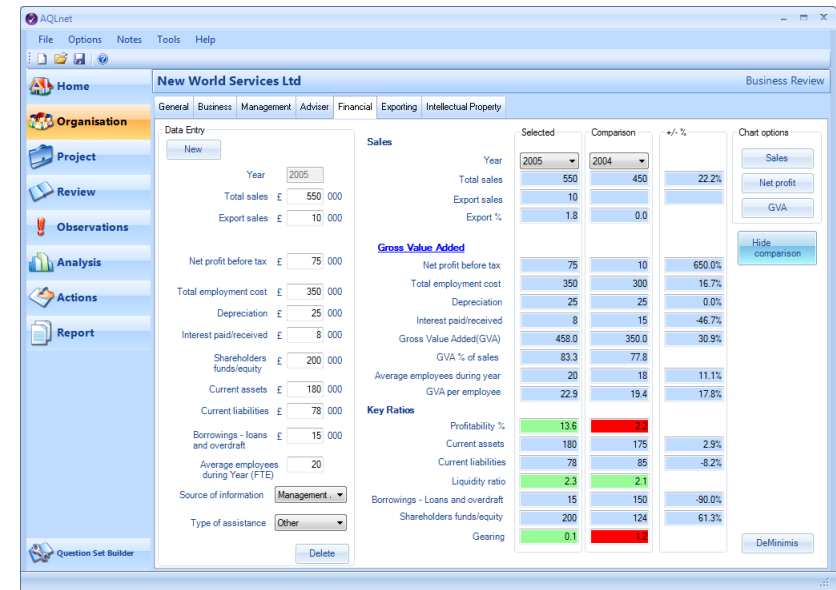
Chart options



Sales
Net profit
GVA

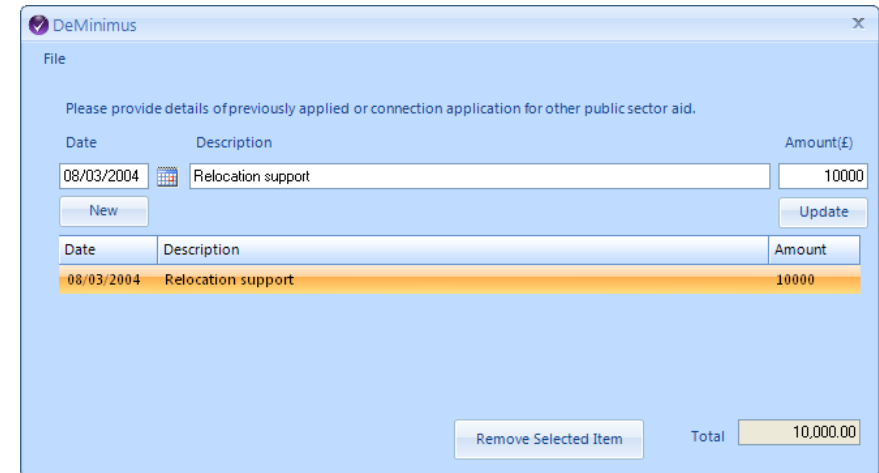
The Chart options panel allows the financial data to be viewed graphically. Click from 'Sales', 'Net Profit' or 'GVA' display the chart.

Right click on the chart to view a further list of chart options.

Copy
Save Image As...
Page Setup...
Print...
Show Point Values
Un-Zoom
Undo All Zoom/Pan
Set Scale to Default



To record previous support that the organisation has received click  . Click  . Enter details on support received.





DeMinimus

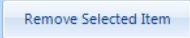
File

Please provide details of previously applied or connection application for other public sector aid.

Date	Description	Amount(£)
08/03/2004	Relocation support	10000

Date	Description	Amount
08/03/2004	Relocation support	10000

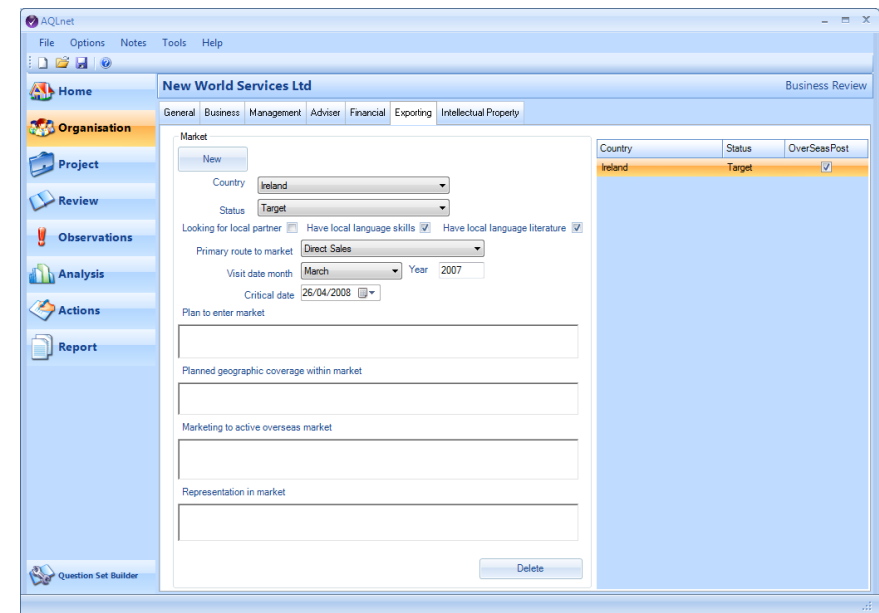
 Total 10,000.00

3.6 Export tab

This tab is used to record data associated with exporting activity.

To add data click  .

Select the country from the drop down list then from the Status option select whether this country is a current export location of a target location. For target location further data may be recorded of planned visits and how business in the target market is to be won. The country is added to the list of target/current export countries.




AQLnet

File Options Notes Tools Help

New World Services Ltd Business Review

General Business Management Adviser Financial Exporting Intellectual Property

Market



Country: Ireland

Status: Target

Looking for local partner ☐ Have local language skills ☒ Have local language literature ☒

Primary route to market: Direct Sales

Visit date month: March Year: 2007


Critical date: 26/04/2008

Plan to enter market

Planned geographic coverage within market

Marketing to active overseas market

Representation in market



Country	Status	OverSeasPost
Ireland	Target	<input checked="" type="checkbox"/>

3.7 Intellectual Property

The organisations status with regard to Intellectual Property is recorded here.

The screenshot shows the 'Intellectual Property' tab in the AQLnet application. The left sidebar contains navigation links: Home, Organisation, Project, Review, Observations, Analysis, Actions, and Report. The main content area is divided into several sections with checkboxes and text input fields:

- Trade Marks:**
 - Do you know what counts as a Trade Mark? ☐
 - Do you have any Trade Marks registered? ☐
 - Please list below:
 - Do you have Trade Marks that should be registered? ☐
 - Please list below:
 - Have you taken steps to protect Trade Marks in target markets? ☐
- Design:**
 - Does this business own designs? ☐
 - Are these designs registered? ☐
 - Please list below:
 - Have you taken steps to protect Designs in target markets? ☐
- Copyright:**
 - Do you know what copyright covers? ☐
 - Have you identified the copyright items in the business and who owns it? ☐
 - Please list below:
 - Have you taken steps to protect your copyrights? ☐
- Patents:**
 - Do you have Patents filed? ☐
 - Please list below:
 - Do you have products and/or processes that should be Patented? ☐
 - Please list below:
 - Do you know that disclosure of your invention before you file a patent is likely to invalidate it? ☐
- Confidentiality:**
 - Are you aware of the importance of confidentiality in protecting your Intellectual Property? ☐

3.8 Custom tab

This tab is used to record data on custom fields. You may define up to 10 text, 10 numeric and 10 check boxes. The title of the tab may also be customised (see section 13.1.6)

The screenshot shows the 'Custom' tab in the AQLnet application. The left sidebar is identical to the previous screenshot. The main content area is titled 'Full Time' and 'Number' and contains a large text input field and a checkbox labeled 'Training Plans'.

4. Project



The Project module is used to assign projects to an organisation and to maintain the status of project milestones. The left hand side of the display shows assigned projects. To add a new project to the organisation click the drop down button and select from the list. To maintain the status of milestones in a project and to add comments on the project select the project from the list in the left hand display. The milestone and its status are shown in the right hand side edit area.

4.1 Creating new projects

To create new projects see Project Maintenance section 13.3

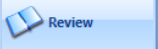
4.2 Recording Time and Expenses costs

To record Time and Expenses against a project milestone click the Timesheet or Expenses tab. For time recording select the milestone and enter a description of the activity followed by the time spent and the unit cost (a default unit cost may be set in the Language and Regional tab of Settings), the total cost is calculated. For expense enter the expense description followed by quantity and unit cost.

Milestone	Status	Date changed
Meet with client	Complete	07/05/2008
Proposal accepted	<Not Set>	02/05/2008
Interim report	<Not Set>	
Final report	<Not Set>	
Sign off	<Not Set>	

Date	Milestone	Activity	Time	Rate	Total
16/09/2010	Meet with	Senior Team	4	60.00	£240.00

5. Review

The Review  module is used to record scores against a set of questions on a specific topic. AQLnet can hold any number of question sets. Before beginning the review section the required question set should be loaded for the question set library. The display area has five sections.

Review Sections

A tree display of the question set. Click the category to view the questions

Checklist

A list of points that should be considered when answering the question is the selected category
The questions to be scored

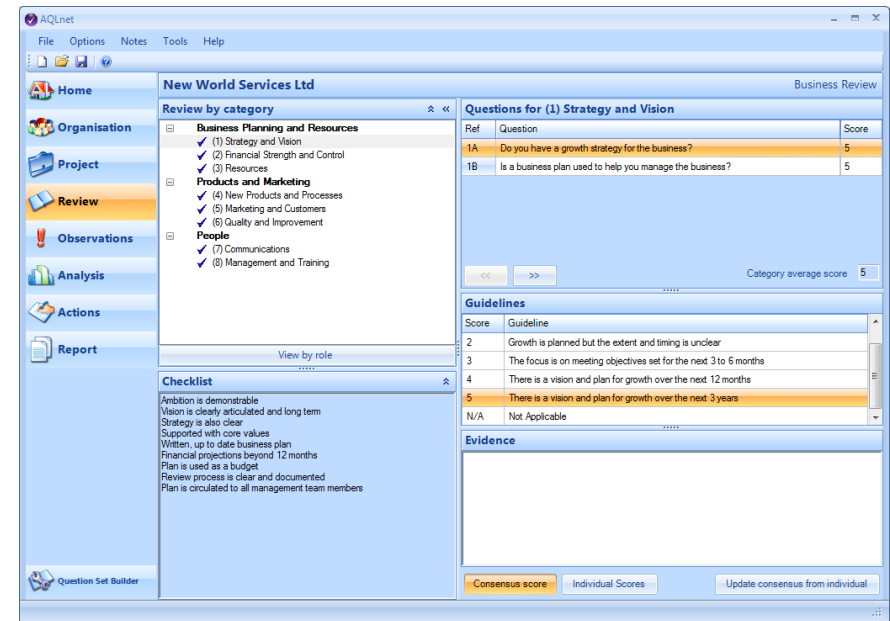
Questions

Guidelines


The valid scores for the selected question

Evidence

A description of the evidence that supports the selected score



5.1 Review actions

To score a question click the question to highlight it then click the guideline which best describes the situation for the organisation. When all the questions in a category have been scored a ✓ appears against the category in the Review Sections panel. Evidence to support the score can be entered in the Evidence box. To move to the next questions click the tree view or use . When all questions have been scored the Actions module may be accessed.

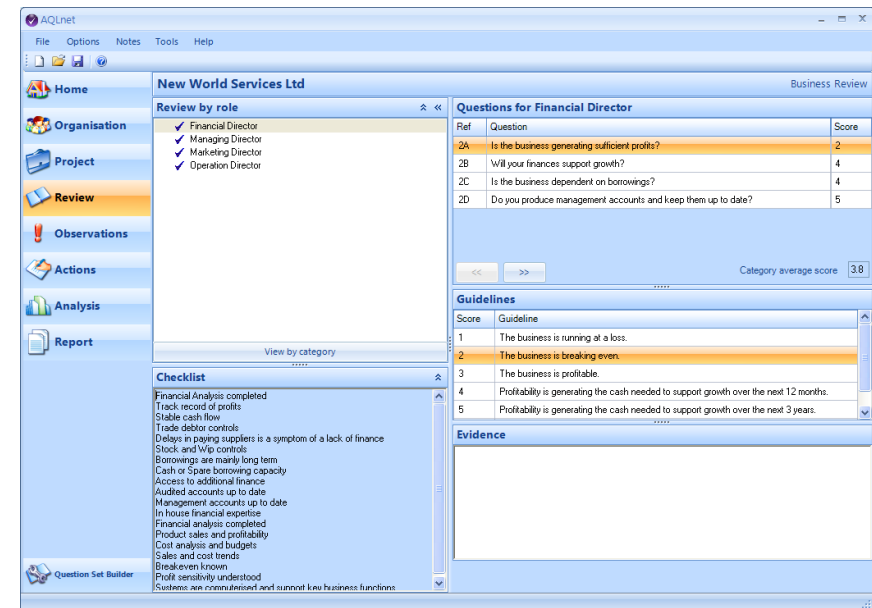
5.2 Individual scoring

When the members of the management team have been entered in the organisation module (see section 3.4) individual scores may be recorded for each member. Click **Individual Scores** to activate the individual scoring options. From the drop down list that appears next to the navigation buttons select the individual whose scores are to be recorded. When scores for a number of individuals have been recorded the consensus (average) score may be updated by clicking **Update consensus from individual**. Notes on consensus scoring:

1. Consensus scores are round down to the nearest whole number e.g. 3.1 and 3.9 are both shown as 3
2. Consensus scores may be amended away from the average without change individual scores.
3. To view the actual average value of the consensus run the Individual scores report.

5.3 Scoring by role

Individual questions may be assigned to a specific role e.g. Financial Director using the Question Set Builder (see section 14.4). When roles have been assigned to questions the option to view questions by role or category is shown.



6. Observations



Observations

The Observations module allows points to be captured for action planning that may not be covered in the formal Review section. It can also be used to add issues for action planning during the course of a project. Issues may also be created using the Notes facility (see section 2). The display area sections are:

Categories

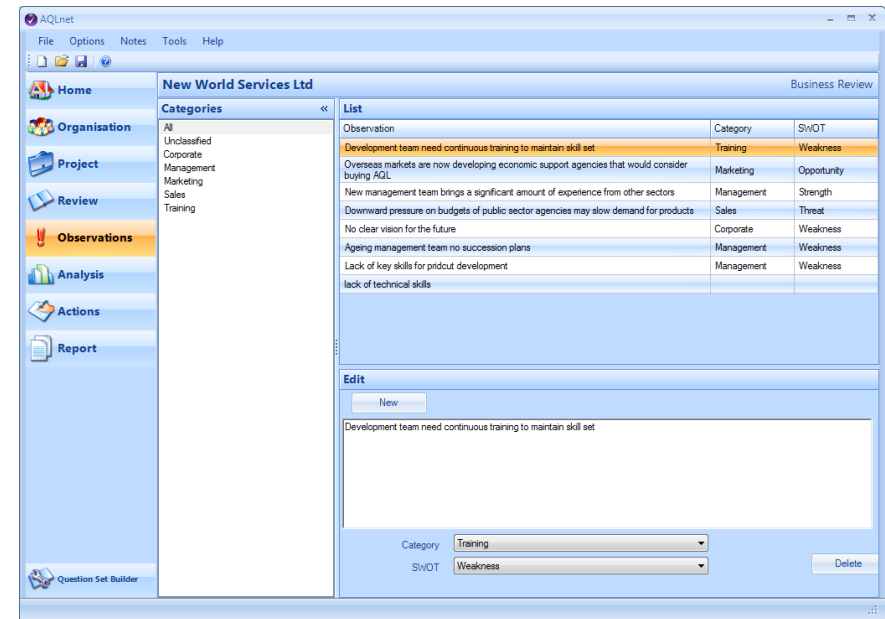
A tree view of the categories to which recorded issues have been assigned

List

The list of recorded issues

Edit

Input section for new issues and modification of existing issues

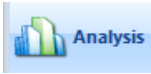


6.1 Recording Observations

To enter an issue click **New Issue**. Type the issue in the input box then classify the issue by selecting from the Issue category drop down and the SWOT Category drop down list.

Category	Training	▼
SWOT	Weakness	▼

7. Analysis



The Analysis section is a graphical display of the Review section scores and allows comparisons to be made between organisations and against an average score (benchmark). Under the Scorecard tab is a histogram of the average score for the question set categories. The dark to light shading for a colour represents categories that belong to the same question area. The black line represents the question set cut-off value. Categories below this line are considered potential weakness and priorities for action.

7.1 Comparing scores

The scorecard options are:

Compare

Comparison with another organisation's score or a different session for the same organisation

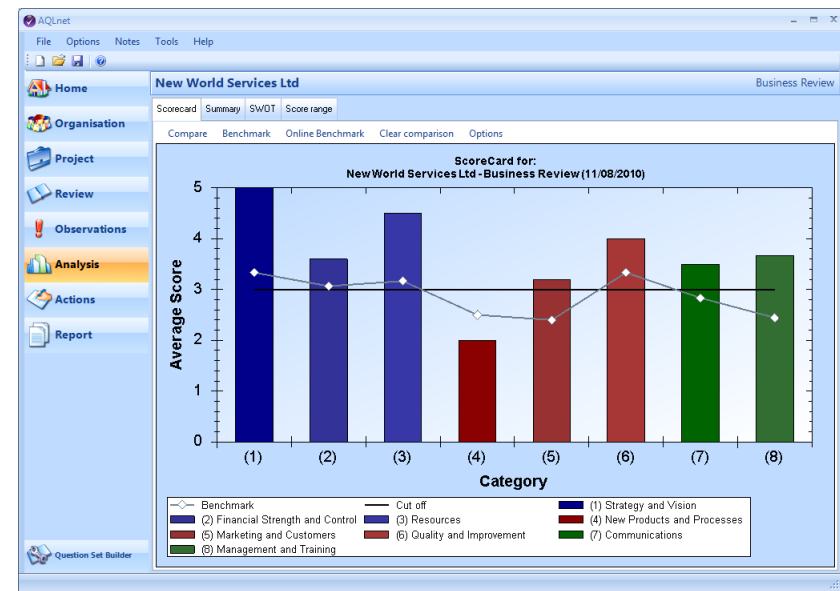
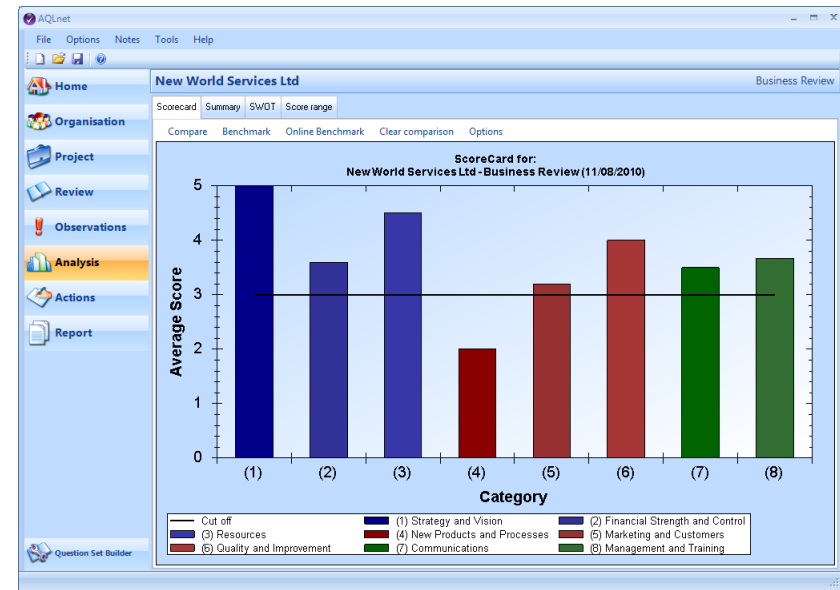
Benchmark

Comparison with the average score for all organisations that have completed the review

Clear comparison

Hide the compare display

The benchmark scores are average for a question set and for a questions set and SIC.



7.2 Analysis summary

Under the summary tab is a tabular display of the review scores showing the percentage score achieved in each category. Listed in the lower part are the questions for that category. The questions with a score below the cut off value are marked as priorities. The priority flag may be removed or added. Those questions marked as priorities are available for action planning.

The screenshot shows the 'Analysis' tab in the AQLnet application. The main window displays a table with the following data:

Area	Category	Action points	Average Score	Achieved Score	Max Score	Achieved %
Business Planning and Resources	(1) Strategy and Vision	1	5.0	10	10	100
	(2) Financial Strength and Control	2	3.6	18	25	72
	(3) Resources	0	4.5	9	10	90
Products and Marketing	(4) New Products and Processes	1	2.0	4	10	40
	(5) Marketing and Customers	1	3.2	16	25	64
People	(6) Quality and Improvement	0	4.0	16	20	80
	(7) Communications	0	3.5	7	10	70
	(8) Management and Training	0	3.7	11	15	73

Below the table, the summary statistics are shown: Total achieved score 91, Maximum score 125, % achieved 73%. At the bottom, a list of questions is displayed with their scores and priority flags.

Ref	Question	Score	Priority
1A	Do you have a growth strategy for the business?	5	<input checked="" type="checkbox"/>
1B	Is a business plan used to help you manage the business?	5	<input type="checkbox"/>

7.3 SWOT Analysis

Under the SWOT tab is a display of the categorised observations and any of the review questions classified in the Actions section. When a question has been defined as a strength or opportunity the question statement is displayed, when defined as a weakness or threat the need to statement is shown. The buttons at the foot of the display allow the sections be enlarged.

The screenshot shows the 'SWOT' tab in the AQLnet application. The main window displays a 2x2 grid of categorized observations:

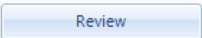
- Strengths:** New management team brings a significant amount of experience from other sectors.
- Weaknesses:** Development team need continuous training to maintain skill set; No clear vision for the future; Ageing management team no succession plans; Lack of key skills for product development.
- Opportunities:** Overseas markets are now developing economic support agencies that would consider buying AQL.
- Threats:** Downward pressure on budgets of public sector agencies may slow demand for products.


At the bottom, there are buttons to toggle between 'All', 'Strengths', 'Weaknesses', 'Opportunities', and 'Threats'. There are also buttons for 'Exclude review questi...' and 'Reset grid size'.

8. Actions

The Action module is used to create an action plan from the results of the review and from recorded issues. The action plan may be based on building on strengths or addressing weaknesses or a combination of both. Action plans are created for the priorities from the review section then for the priority issues. Once an action plan has been created it may be maintained through the Action Summary.

8.1 Review actions

Under the Action Detail tab click on . Listed are the results from the Review module. The default is all questions scoring below the question set cut-off score are automatically made a priority. To change a question status check or uncheck the Priority box. Questions may also be categorised for inclusion in a SWOT analysis.

Score	Priority	SWOT
2	<input checked="" type="checkbox"/>	Weakness 

Action may be created for other question by selecting one of the following options.

Improvement options

Strength options

All questions

Priority

Secondary

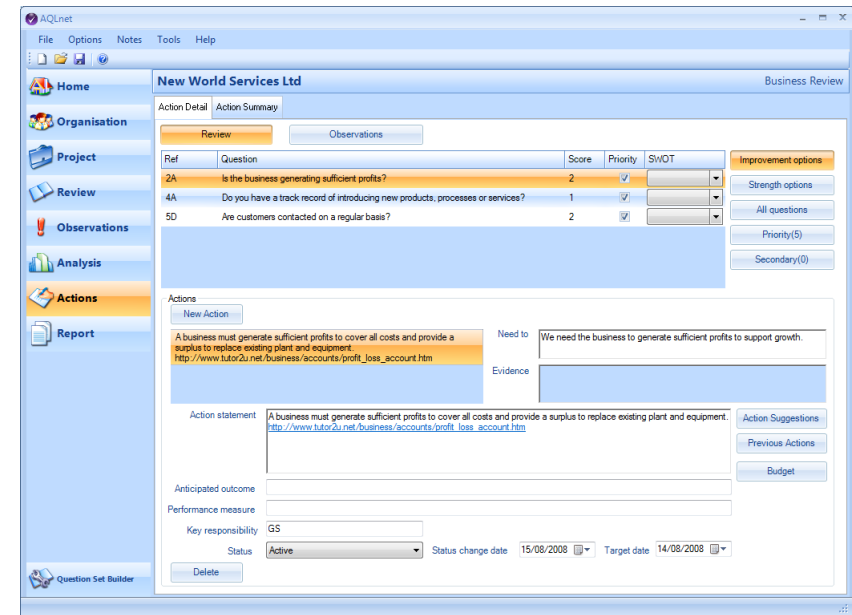
List all questions that have scored below the cut off score for the question set use during the review section

List all questions that have scored above the cut off score for the question set use during the review section

List all questions for the question set use during the review section

List all questions that have been flagged as being a priority

List all questions that are not flagged as a priority



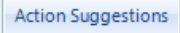

To add an action click on

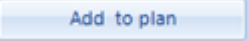
New Action

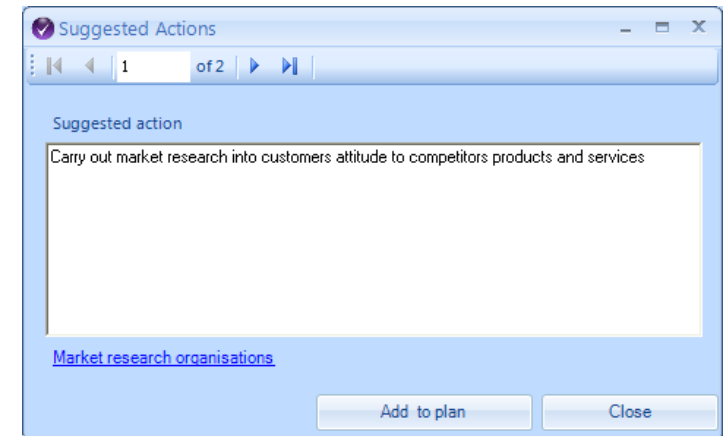
In the Actions panel enter details of the action to address the issue. The 'Need to' statement may be edited by clicking into the text box.

To add budget data for the action click **Budget**. Funding for the action can be allocated to three different sources as well as the organisation (see 11.1.4 on how to set budget labels). The budget window shows the total budget for all the action to address the issue and the overall budget for all issues.

8.2 Actions suggestions

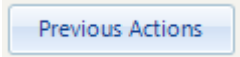
Action suggestions are pre-defined actions to address the issue (see section 14.4 on creating action suggestions). Click  The action suggested window is displayed. Where there is more than one action suggestion use the navigation panel  to view the next suggestion.

Click  to add the suggestion to the action plan.

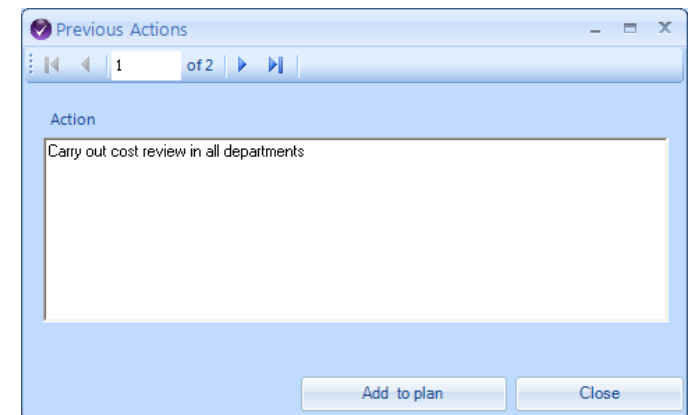


8.3 Previous actions


Actions created for use with a different organisation may be used with the current organisations.

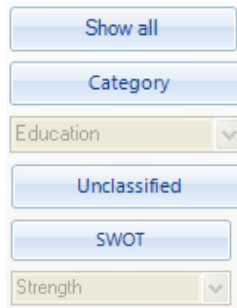
Click  The top 20 actions used with other organisations for this issue are shown

Click  to add to the action plan.



8.4 Observation actions

Under the Action Detail tab click on . The displayed issues may be changes using the following options.

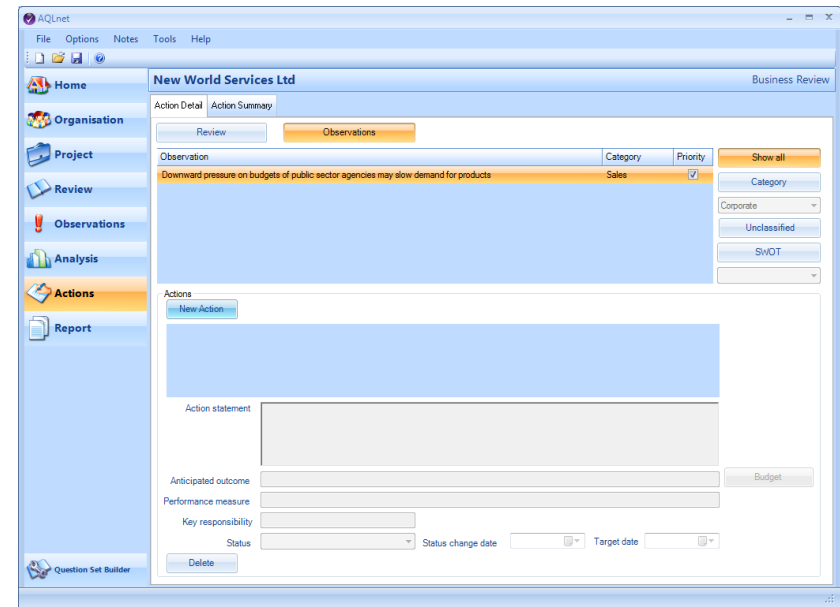


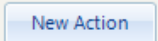
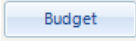
List all observations

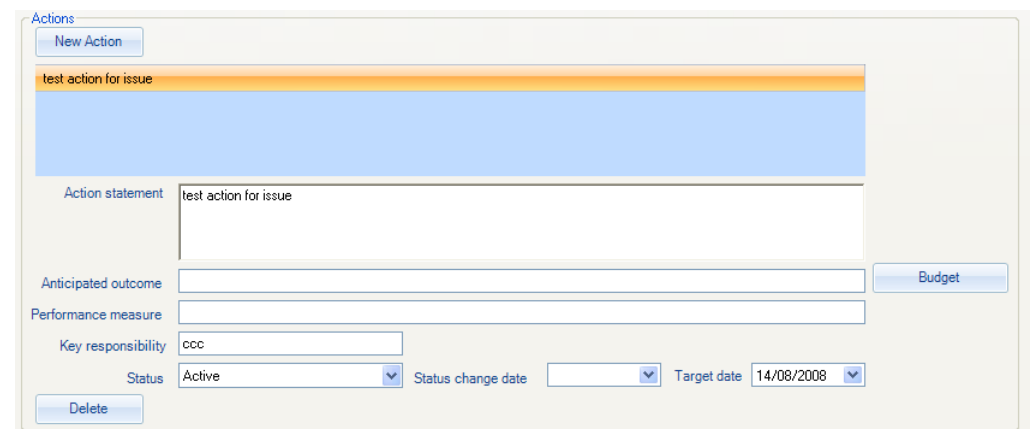
List observations belonging to the selected category

List unclassified observations

List observations belonging to the selected SWOT category




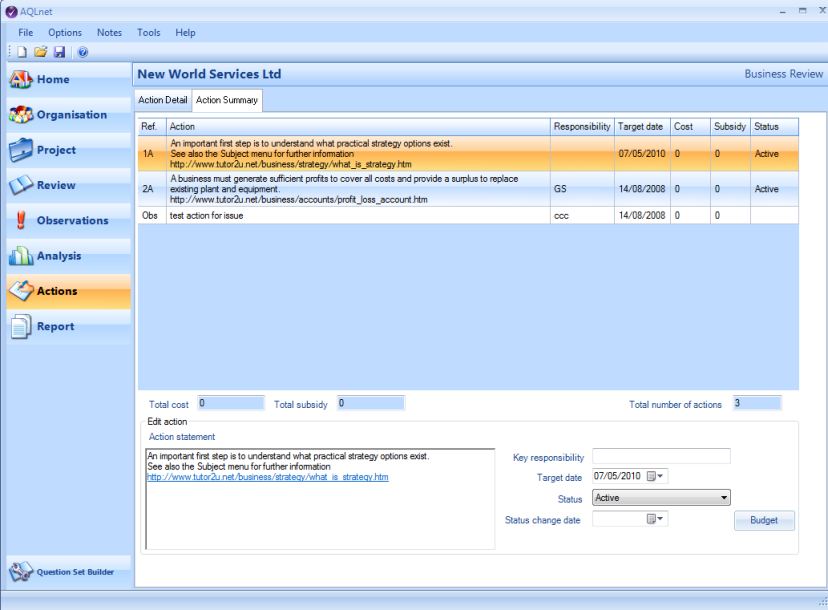
To add an action click . In the Actions panel enter details of the action to address the observation. To add budget data for the action click .



8.5 Action summary

Under the Action summary are listed all the actions. To modify the details on an action select the action from the list and edit the details in the Edit action panel.

To modify the budget details of an action click  .



Ref	Action	Responsibility	Target date	Cost	Subsidy	Status
1A	An important first step is to understand what practical strategy options exist. See also the Subject menu for further information http://www.tutor2u.net/business/strategy/what_is_strategy.htm		07/05/2010	0	0	Active
2A	A business must generate sufficient profits to cover all costs and provide a surplus to replace existing plant and equipment. http://www.tutor2u.net/business/accounts/profit_loss_account.htm	GS	14/08/2008	0	0	Active
Obs	test action for issue	ccc	14/08/2008	0	0	

Total cost 0 Total subsidy 0 Total number of actions 3

Edit action


Action statement
An important first step is to understand what practical strategy options exist. See also the Subject menu for further information http://www.tutor2u.net/business/strategy/what_is_strategy.htm

Key responsibility:

Target date: 07/05/2010

Status: Active

Status change date:



9. Report

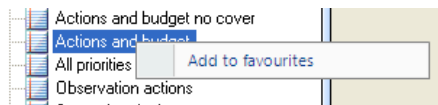


Available reports are shown in the report options pane. Click the folder icon to display the list of reports.

Double click the report description to create the report or select and click

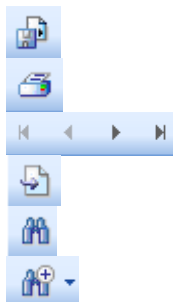
Generate Report

Frequently used reports may be added to a 'My Favourites' folder by doing a right mouse click on the report to be added and clicking on 'Add to favourites'



9.1 Print option

The report is shown in the Report Viewer. The following options are available.



Export report in Adobe, Excel, Word or RTF format

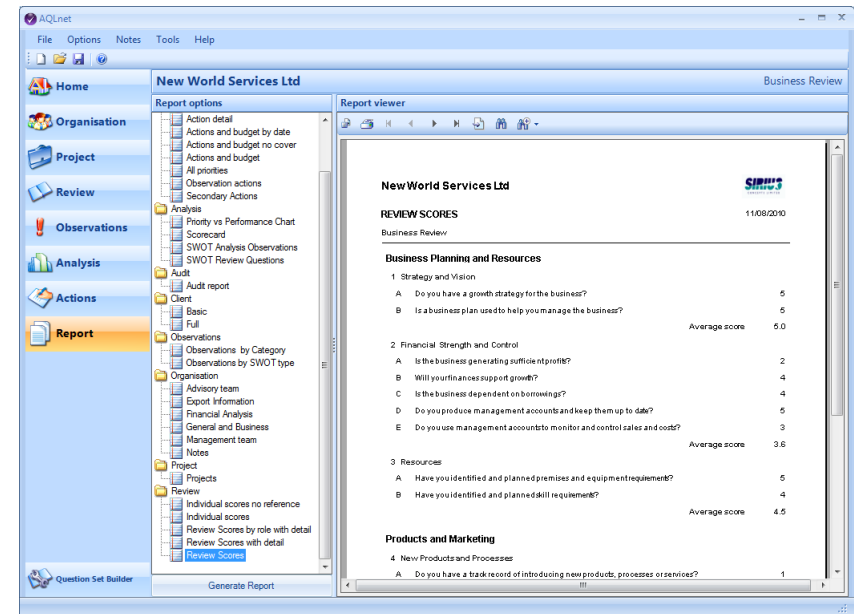
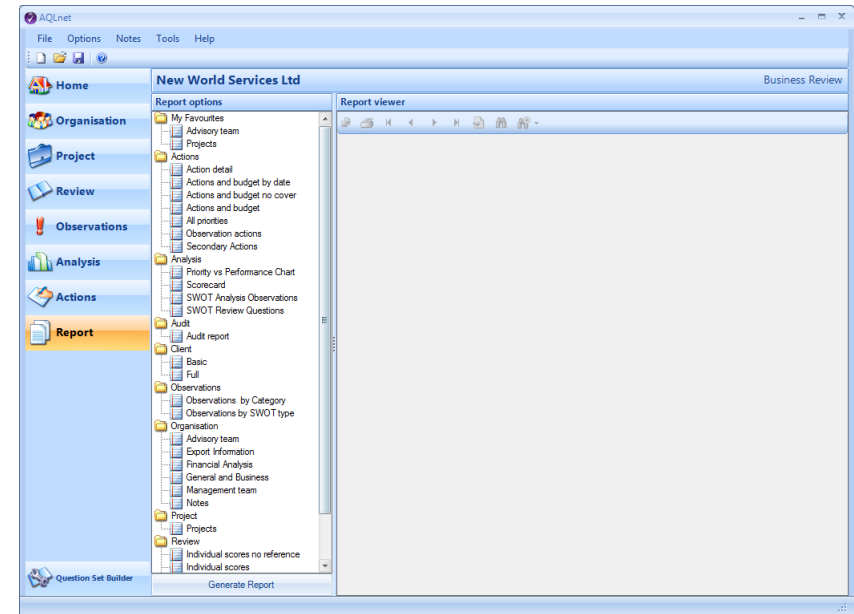
Print report

Page through report

Go to page

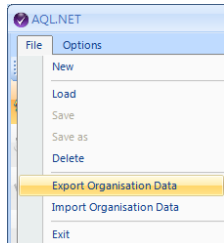
Find text

Zoom



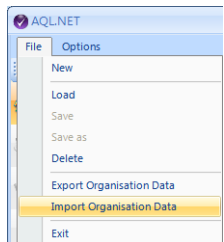
10. Data Exchange

Users working with an organisation that has implemented AQL Reporting Services can use that service to exchange review data. When AQL Reporting Services is not implemented data can be exchanged as follows.



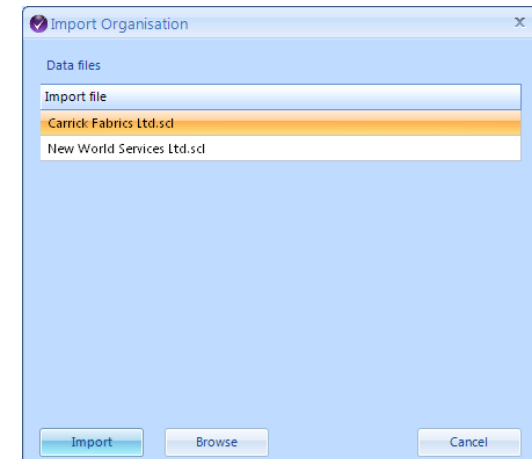
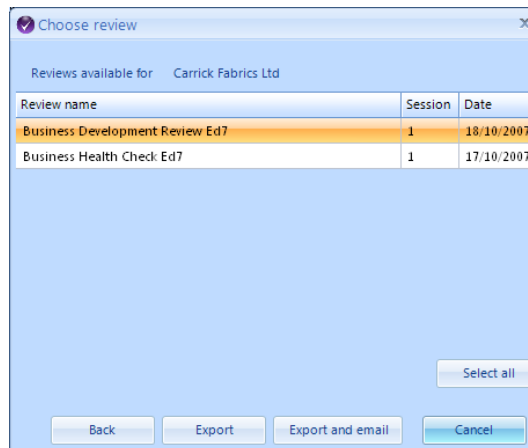
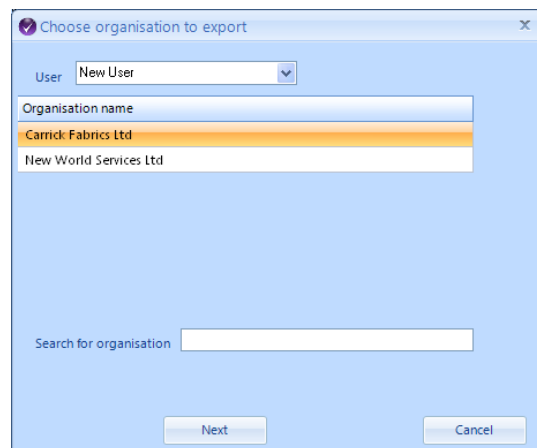
Step 1- Export to Data file

From the menu bar select Export Organisation Data. Select the required organisations from the displayed list and click **Next**. Select the review and click **Export** to create a data file in the default data file folder (see section 13.1) or **Export and email** to attach the data file to an email.



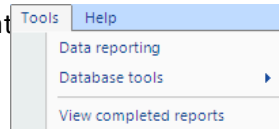
Step 2 – Import from Data file

Save received data file to the default data file folder. From the menu bar select Import Organisation Data files in the default data file folder are listed. Select the file required and click **Import**. The selected organisation is added to the database.



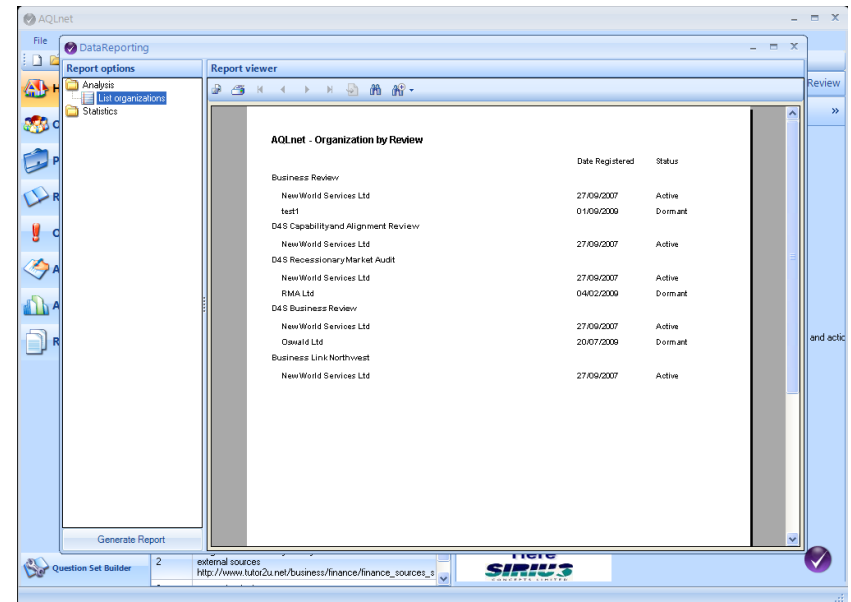
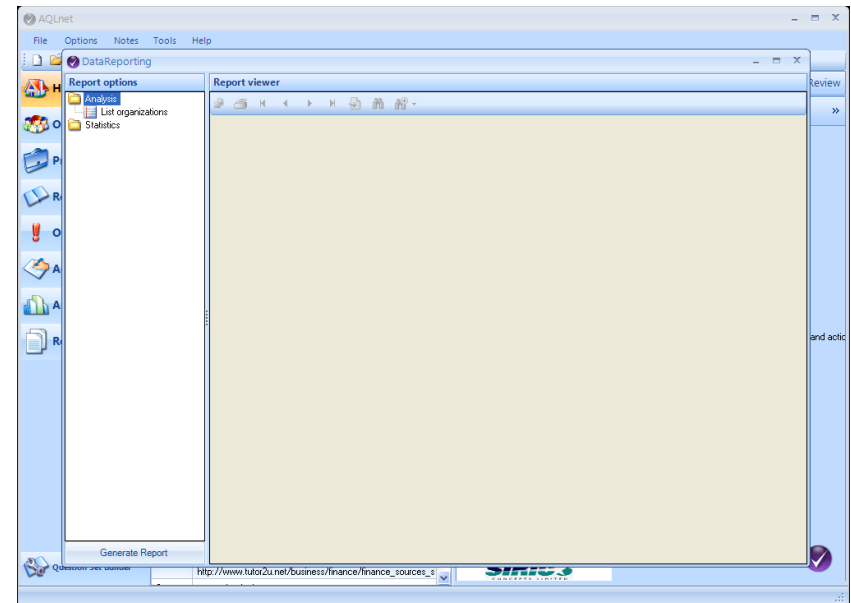
11. Tools

Use the options found under Tools in the menu bar to analysis data, view stored reports and to backup the data.


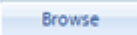


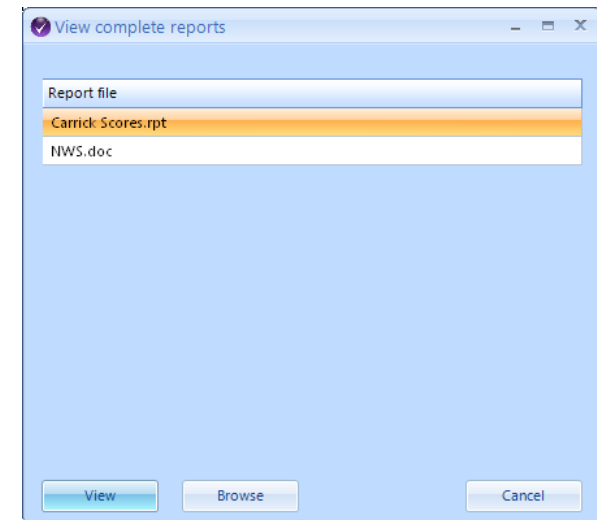
11.1 Database reporting

Database reporting provides summary and statistical reports on stored reviews. Reports are shown in a report viewer and may be printed or saved using the options described in section 9.



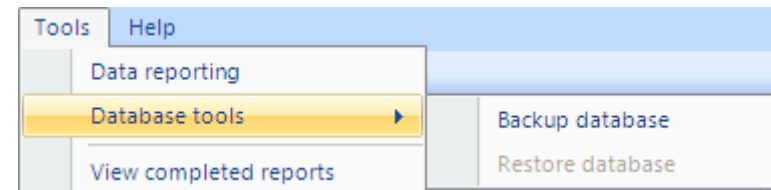
11.2 View completed reports

Lists reports exported from the Report module. To view select the report and click  .
Use  to view report save in another location.



11.3 Database tools

This option is used to backup and restored the AQLnet database.
The restore option is only operational when the application has been started and before any data has been entered or stored data loaded.

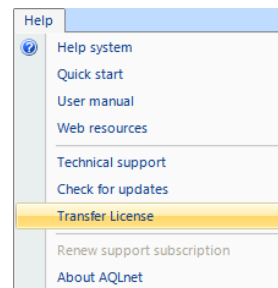


12. License

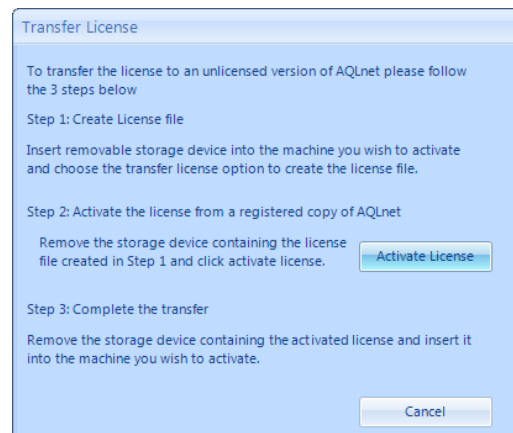
AQLnet is licensed per PC. A user may install the software on as many PC as they wish but require a license for each copy, however the license may be transfer from one PC to another as often as you wish.

12.1 Transferring a license

Use the Transfer License option found under Help in the menu bar.



Install AQLnet on the PC that the license is to be transferred to then follow the instructions displayed.



Part II: Set up and Review Creation

13. Set up

This section describes how to set up AQLnet to meet your preferences.

13.1 Settings

The following settings may be amended.

13.1.1 Configuration

User identify: Where more than one user accesses the same database and/or when a group of users are copying data to AQL Reporting Services then each user must have a unique id. When none of these conditions apply the default value of 2 should be used. Where an id number is required check you the system administrator what value should be used

Database Type: The database type may be set to either Access or SQL Server. SQL Server users should contact the system administrator for connection details.

Database Location: Applies only to Access databases and needs to be amended when database location is changed from that select during installation.

NB when connected to a different database for that select during the installation it is important to ensure that user id exists on the new database

Data file Directory: The default folder for exported data files

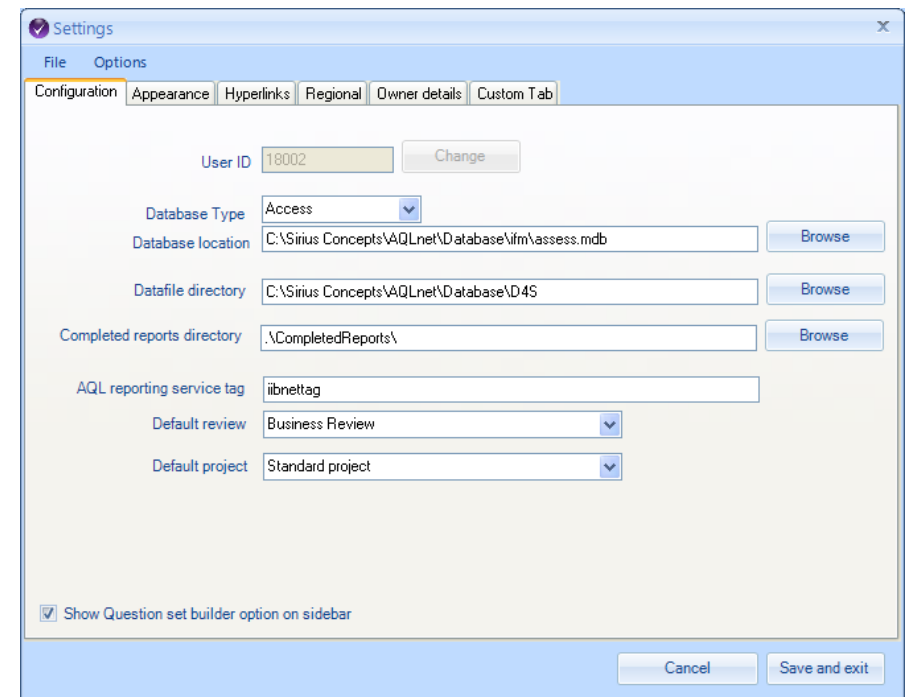
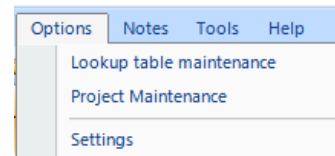
AQL Reporting Service Tag: Connection value for RS Service (see Part III)

AQL Online ID: Connection value for web system (see Part III)

AQL Online url: Host of web system (see Part III)

Default review: Default review when new organisation is created


Default project: Default project when new organisation is created



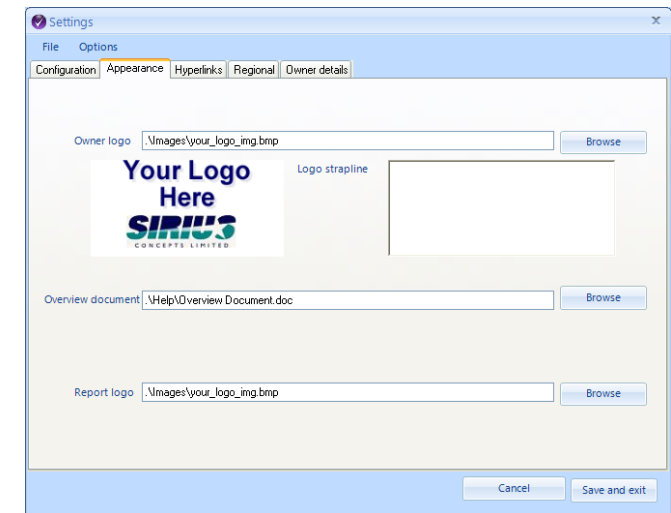
13.1.2 Appearance

Owner logo: Image to appear on Home screen (leave blank if no image required).

Logo strap line: Text to appear next to owner logo.

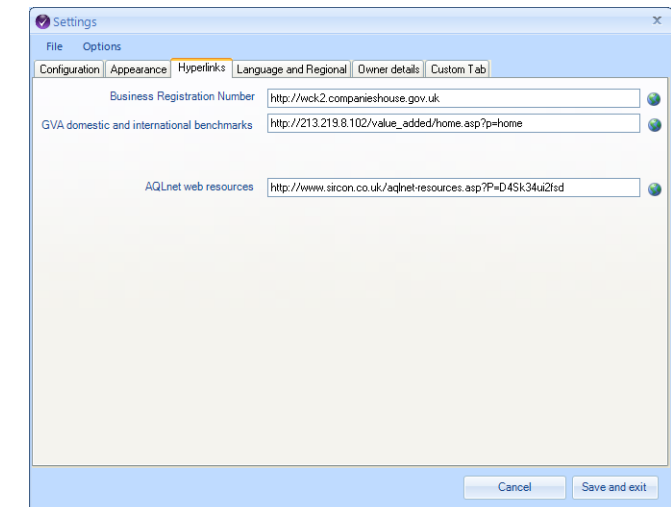
Overview Document: Document to be shown when  is clicked in Home display organisation information panel.

Report logo: Image to appear in reports (leave blank if no image required). Only bitmap images (.bmp) are valid.



13.1.3 Hyperlinks

Enter the url of the information source to be shown when the described hyperlink is clicked



13.1.4 Regional

System region: Set the region for currency symbol and spelling dictionary

System currency symbol: Override the region setting

Spell check dictionary language: Override the region setting

Default charging rate: Unit value used by timesheet

Budget screen labels

Other source 1: budget label

Other source 2: budget label

Other source 3: budget label

The screenshot shows the 'Settings' dialog box with the 'Language and Regional' tab selected. The 'Spellcheck dictionary language' is set to 'English (United Kingdom)'. The 'Currency symbol' is set to '£'. The 'Default charging rate' is set to '1'. Under the 'Budget screen labels' section, there are three input fields: 'Other sources 1' with 'Source 1', 'Other sources 2' with 'Source 2', and 'Other sources 3' with 'Source 3'. The 'Cancel' and 'Save and exit' buttons are at the bottom right.

13.1.5 Owner Details

Information on owner of software

The screenshot shows the 'Settings' dialog box with the 'Owner details' tab selected. The fields are filled with the following information: Surname: 'New', Forename: 'User', Company: 'Sirius Concepts Ltd', Telephone: '01292 521376', Fax: (empty), Email: 'sirius@siricon.co.uk', Address line 1: 'Oswald Hall', Address line 2: 'Auchincruive', Address line 3: (empty), Town/City: 'Ayr', County: 'South Ayrshire', and Postcode: 'KA6 5HW'. The 'Cancel' and 'Save and exit' buttons are at the bottom right.

13.1.6 Custom tab

An additional tab will be displayed in the Organisation module if the enable custom tab box is checked. Define the labels to be used for up to 10 text, 10 numeric and 10 check boxes. To activate the fields check the box next to the label.

The screenshot shows the 'Settings' window with the 'Custom Tab' tab selected. The 'Enable custom tab' checkbox is checked, and the 'Tab name' is 'My Data'. Below this, there are three sections for 'Available fields': 'Text fields', 'Numeric fields', and 'Checkbox fields'. Each section has a table with 'Enabled' and 'Label name' columns.

Text fields	
Enabled	Label name
<input checked="" type="checkbox"/>	New Designs
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Numeric fields	
Enabled	Label name
<input checked="" type="checkbox"/>	Number per yer
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

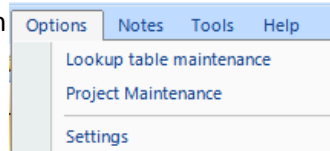
Checkbox fields	
Enabled	Label name
<input checked="" type="checkbox"/>	In house
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

At the bottom right of the window are 'Cancel' and 'Save and exit' buttons.

13.2 Look up tables

The Look up tables contain the data display when a drop down button is clicked.

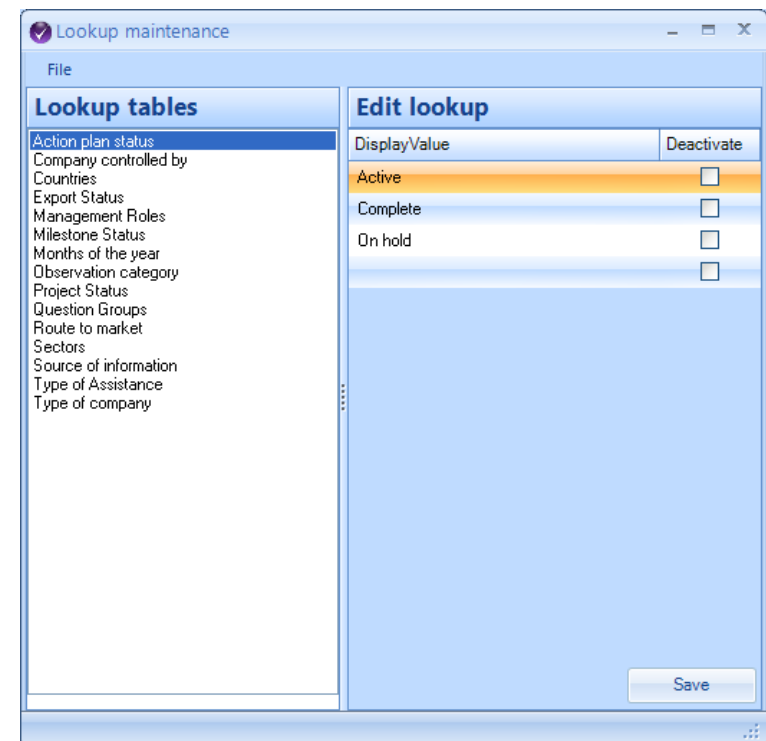
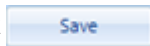
To change the data shown in a drop down click on



Select the table to be changed from the list shown under **Lookup tables**

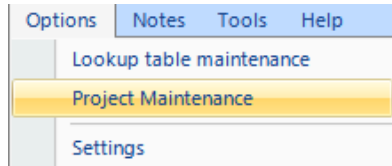
Add or amend the text in the column **DisplayValue**



Click

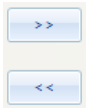


13.3 Project Maintenance


Projects may be added or amended using Project Maintenance.

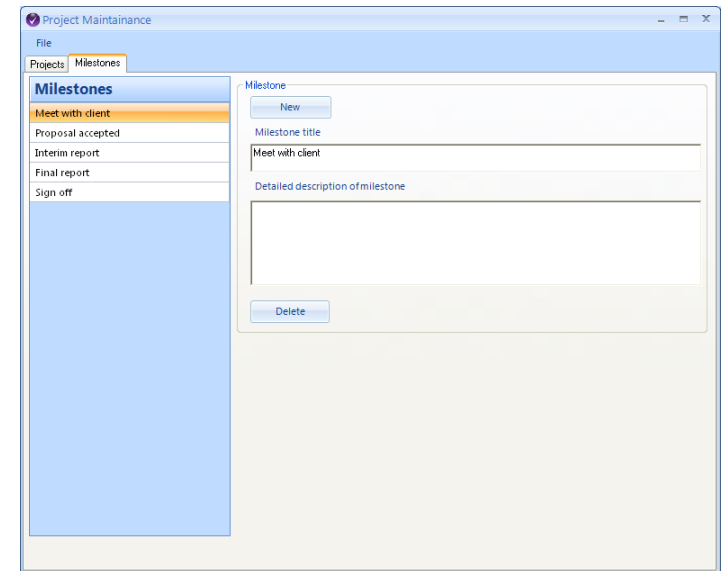
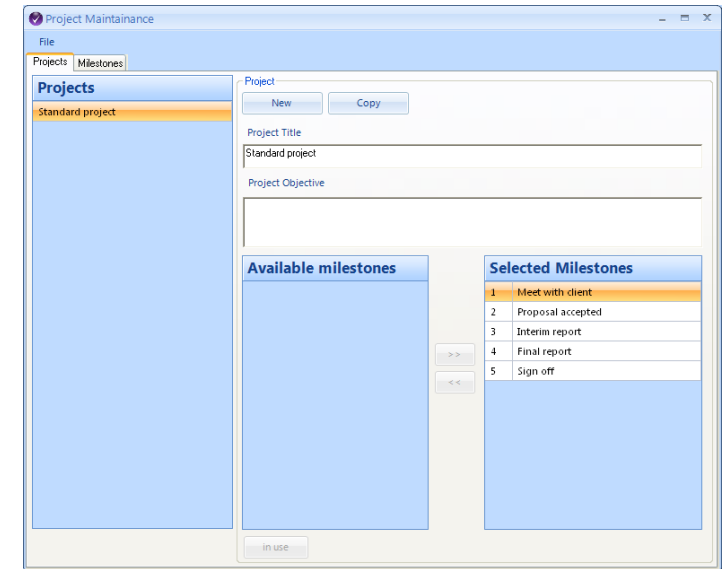


In the project tab click . Enter a project title and description. Use the add and remove buttons  to assign milestones to the project.

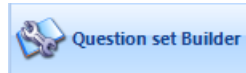


13.3.2 Adding milestones

In the milestone tab Click . Enter the milestone name and description. When complete the new milestone is available to add to new or existing projects.



14. Question Set Builder



A Question Set is a structured set of questions used in the Review section of AQLnet to determine strengths and weaknesses on a given subject. Ready made Question Sets are supplied with AQLnet or may be purchased independently. Users who wish to create their own Question Sets may do so using the Question Set Builder. A Question Sets can be constructed using existing questions from the Question Bank or from new questions.

14.1 Question Set Structure

Understanding the Question Set structure makes the creation of new Question Sets a simple task.

Question Set

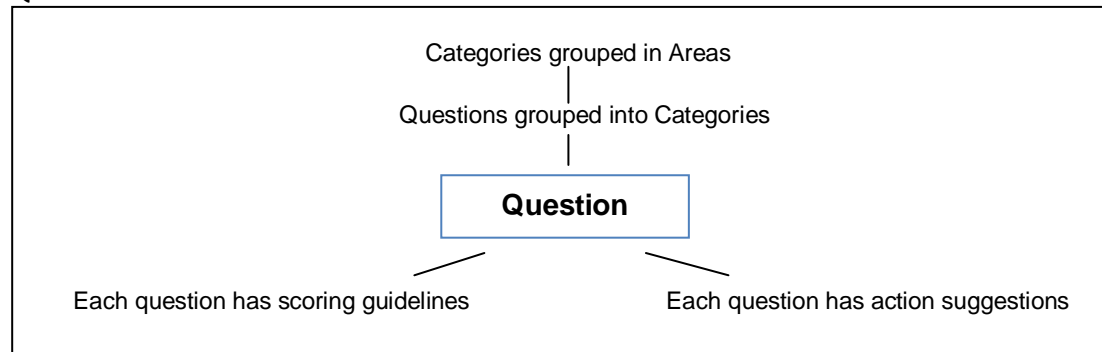


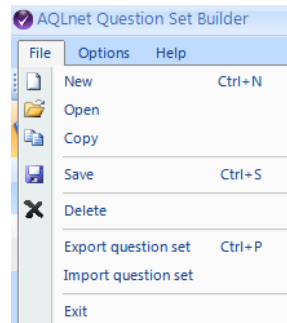
Table 2: Question set structure

Questions covering a specific subject matter are grouped into Categories which can in turn be grouped into Areas covering a general theme. Each question is supported with specific scoring guidelines. Suggested actions, for use when that question has been identified as one that needs to be addressed, may also be added outlining a course of action and pointing to information sources on the Web.

There is no practical limit to the number of Questions, Categories and Areas in a Question Set however there must be a least one Category and one Area per Question Set.

14.2 Creating a new Question Set

To create a new Question Set select File/New



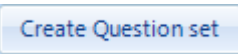
Complete the new Question Set form.

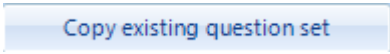
Question set title: The name the question set will be known by.

Question set description: A full description of the subject addressed.

Scoring range: The number of possible answers to a question.

Cut off score: The score below which a question will be regarded as a weakness and a priority for action.

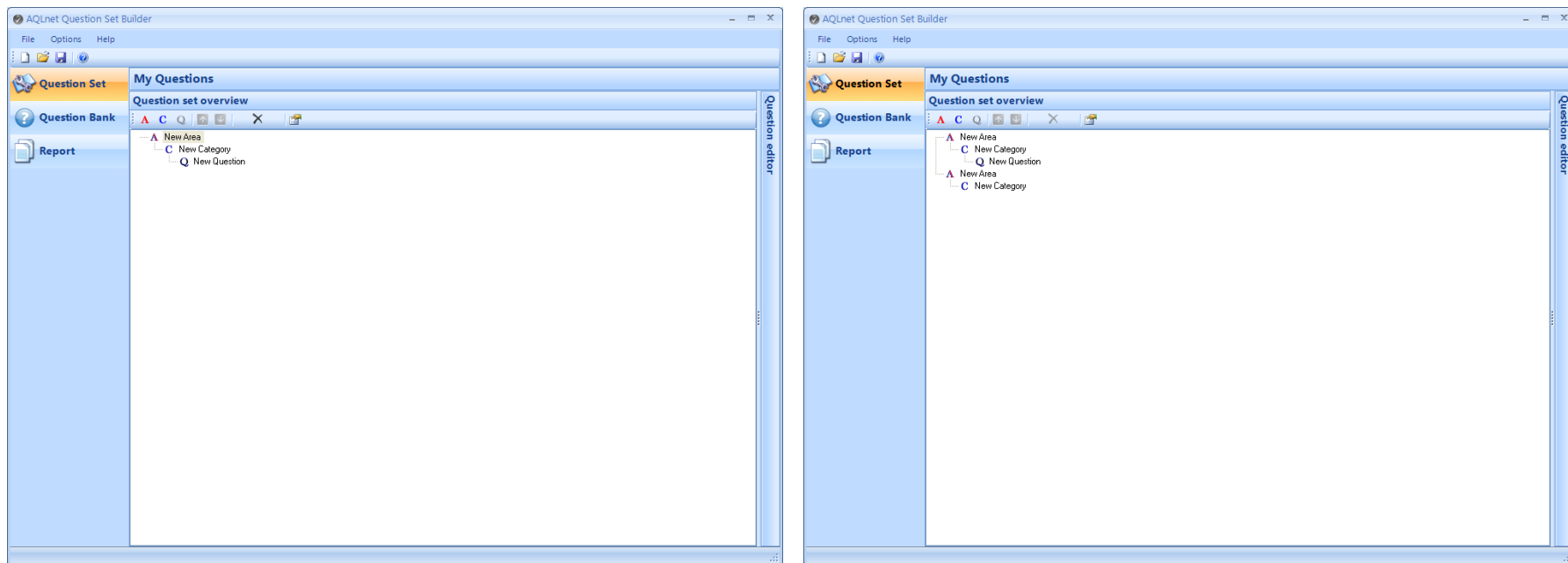
To display the Question Set maintenance options click 

The  button is used to amend a question sets while retaining the original. It is also used when a question set cannot be changed because an organisation has already completed a review against the question set.


A screenshot of the 'Create question set' dialog box. It has a title bar with a checkmark icon and the text 'Create question set'. The dialog contains four input fields: 'Question set title' with the text 'My Questions', 'Question set description' with the text 'An example question set', 'Scoring range' with the value '5', and 'Cut off score' with the value '3'. At the bottom right, there are three buttons: 'Copy existing question set', 'Cancel', and 'Create Question set'.

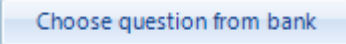
14.3 Creating the question set structure

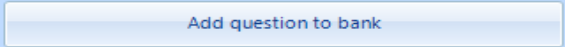
The steps in creating a new Question Set are to group questions into Categories then to group the Categories into Areas. Questions are assigned to a Category from the question bank or a new question can be created. An initial structure of one area, one category, one question is created for you. Add additional areas and categories by clicking on the **A** then categories by clicking **C**. As areas and categories are added the structure of the question set is displayed. Double click each node to edit the text or right click to access options. Drag and drop allows the order of nodes to be changed.

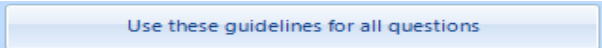


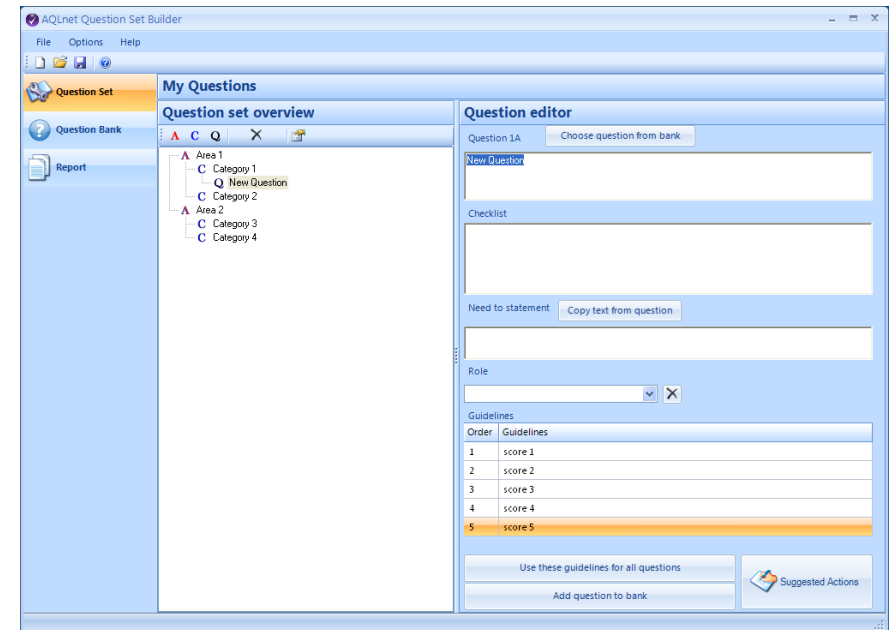
14.4 Adding questions and suggested actions



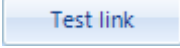
For each category click  to add questions. The question editor is shown. Enter the question text followed by text (checklist) that gives guidance on how to score the question. The need to statement, if entered, will appear in the action planning section. The question may be assigned to a specific role, if this option is used the question list may displayed in role order in the Review section. Scoring guidelines for each value of the scoring range may be recorded.

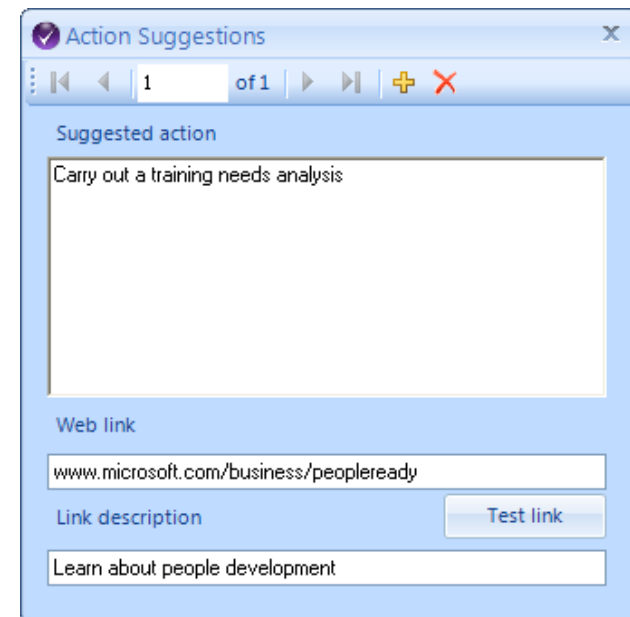
To add questions from the Question Bank click  Then select the required question.

When a new question has been created you may add it to the Question Bank by clicking  then selecting a question bank group.

To apply the scoring guidelines for one question to all the questions in the question set click 



Suggested actions are activities which may be undertaken when the question is identified as a priority and included in an action plan. To add a suggested click the  icon. In the Action Suggestion window click  to add a new suggestion. Enter a description of the action that would be added to an action plan. The suggested action may be supported by a link to an information source on the Web and the link description is the text that is used in AQLnet suggestion window, however the url is placed in the action to ensure that the reports show a valid link. Use  to verify that the web link is valid.

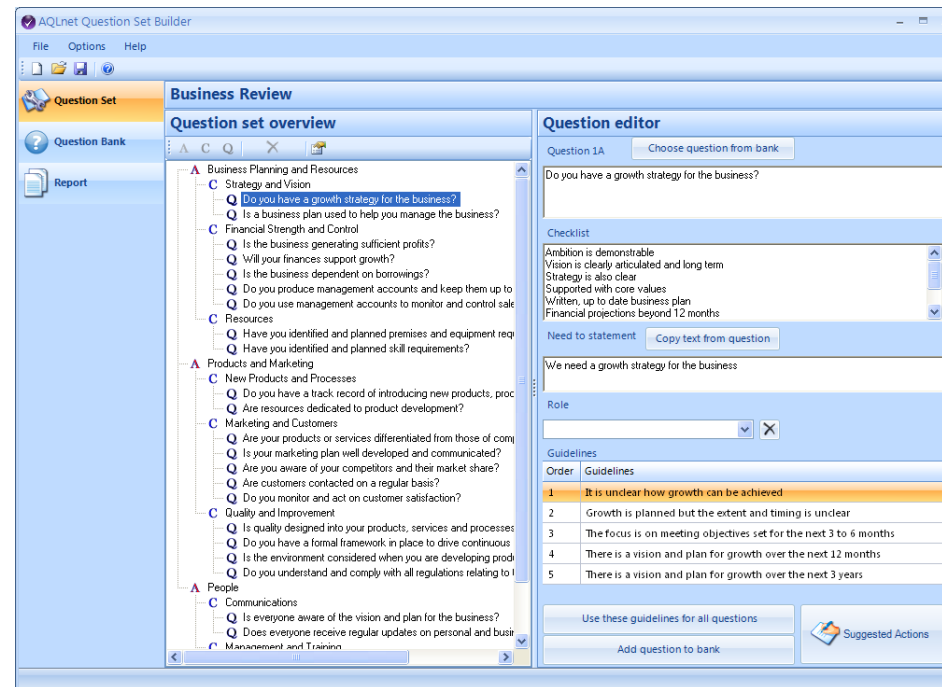


The screenshot shows a window titled "Action Suggestions" with a close button (X) in the top right corner. Below the title bar is a toolbar with navigation icons (back, forward, search, etc.) and a status bar showing "1 of 1". The main content area is divided into two sections. The first section, labeled "Suggested action", contains a text box with the text "Carry out a training needs analysis". The second section, labeled "Web link", contains a text box with the URL "www.microsoft.com/business/peopleready". Below the URL text box is a "Link description" text box containing the text "Learn about people development". To the right of the "Link description" text box is a button labeled "Test link".


14.5 Modifying a Question Set

When results are held against a question set changes are limited to modifications of the text of Areas, Categories, Questions or Guidelines. New elements, Areas, Categories or Questions may only be added or removed from a question set that has no results held against it. To change a question set where results exist make a copy of the question set. Open the question set to be modified by selecting File/Open from the menu bar.


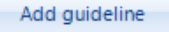
The question set is displayed in the Question Set overview. Use drag and drop to change the order of areas, categories and questions.

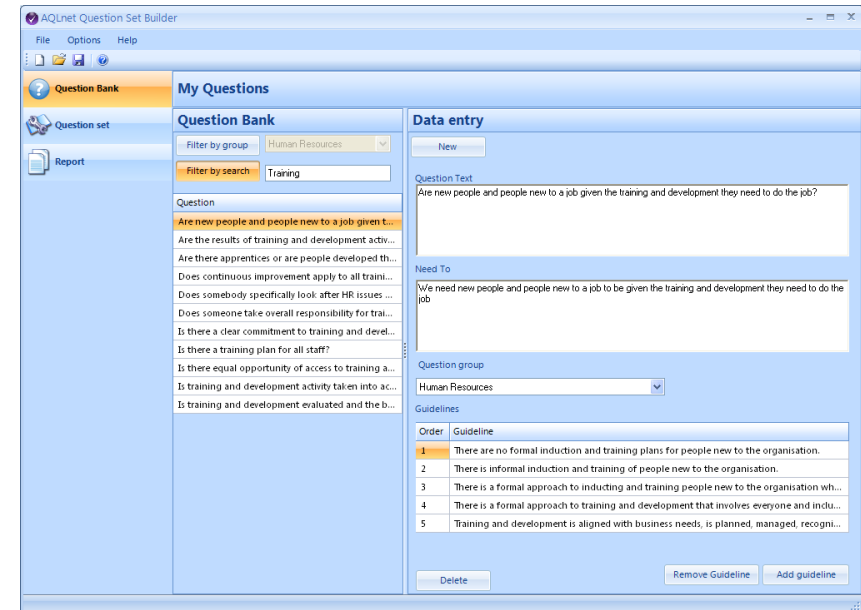


14.7 Question Bank

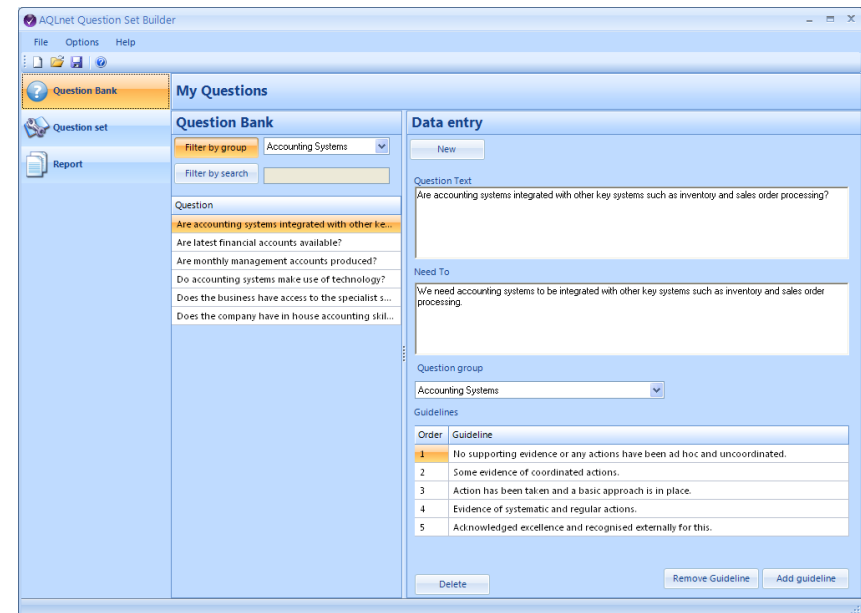
The question bank holds a list of questions, grouped by topic that may be used to create a question set. Questions in the bank may be used in several question sets. The question bank screen is the default display when the Question Set Builder is started. The question bank can be viewed at anytime by clicking on  Question Bank. To view questions in the bank use the Filter by group drop down option or the Filter by search option. The search option displays all questions which contain the search text.

14.7.1 Adding questions

To add a question to the bank click  then enter the question text followed by the 'Need to' text. The 'Need to' text is the action statement that appears in the action plan when this question is identified as a priority. Add guidelines by clicking . Guidelines describe the score assigned to the question in the Review process. The number of guidelines for a question is the same as the question set scoring ranges. When a question is added to a question set the number of guidelines per question will be limited to the question set scoring range.



The screenshot shows the AQLnet Question Set Builder application. The left sidebar contains icons for 'Question Bank', 'Question set', and 'Report'. The main area is divided into three sections: 'My Questions', 'Question Bank', and 'Data entry'. The 'Question Bank' section has a 'Filter by group' dropdown set to 'Human Resources' and a 'Filter by search' text box containing 'Training'. Below this is a list of questions, with the first one highlighted: 'Are new people and people new to a job given t...'. The 'Data entry' section has a 'New' button, a 'Question Text' field containing 'Are new people and people new to a job given the training and development they need to do the job?', a 'Need To' field containing 'We need new people and people new to a job to be given the training and development they need to do the job', a 'Question group' dropdown set to 'Human Resources', and a 'Guidelines' table with 5 rows. The table has columns 'Order' and 'Guideline'. The first row is highlighted with a score of 1 and the guideline 'There are no formal induction and training plans for people new to the organisation.' At the bottom are 'Delete', 'Remove Guideline', and 'Add guideline' buttons.




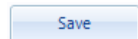
The screenshot shows the AQLnet Question Set Builder application with the 'Question Bank' section filtered by 'Accounting Systems'. The 'Filter by search' text box is empty. The list of questions shows the first one highlighted: 'Are accounting systems integrated with other k.e...'. The 'Data entry' section has a 'New' button, a 'Question Text' field containing 'Are accounting systems integrated with other key systems such as inventory and sales order processing?', a 'Need To' field containing 'We need accounting systems to be integrated with other key systems such as inventory and sales order processing', a 'Question group' dropdown set to 'Accounting Systems', and a 'Guidelines' table with 5 rows. The table has columns 'Order' and 'Guideline'. The first row is highlighted with a score of 1 and the guideline 'No supporting evidence or any actions have been ad hoc and uncoordinated.' At the bottom are 'Delete', 'Remove Guideline', and 'Add guideline' buttons.

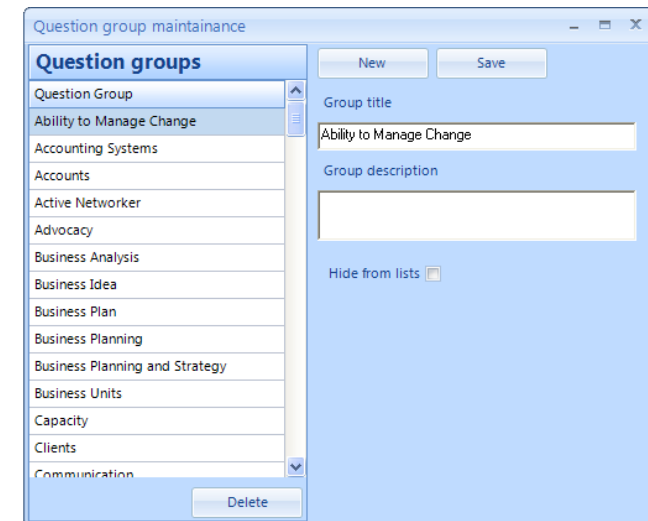
14.7.2 Managing questions

To move a question from one group to another select the question then on the question maintenance screen select the new group from the Question set group drop down list.

To create a new question group select Options/Question groups from the menu bar.

Click  then type the group name and group description. Then click

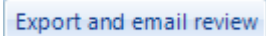




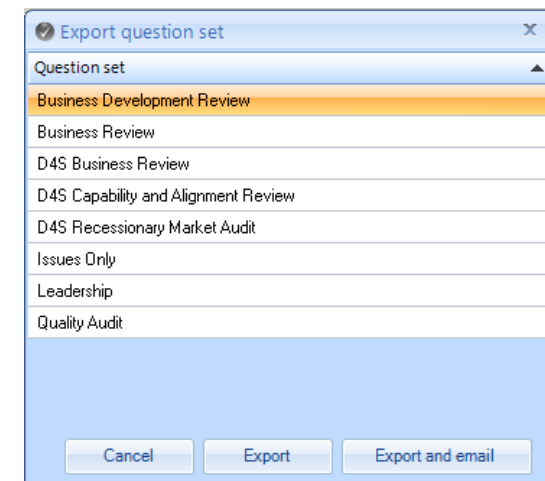
The 'Question group maintenance' dialog box has a title bar with standard window controls. It contains a 'Question groups' section on the left with a list box showing various categories: Question Group, Ability to Manage Change, Accounting Systems, Accounts, Active Networker, Advocacy, Business Analysis, Business Idea, Business Plan, Business Planning, Business Planning and Strategy, Business Units, Capacity, Clients, and Communication. A 'Delete' button is at the bottom of this list. On the right, there are 'New' and 'Save' buttons at the top. Below them is a 'Group title' text field containing 'Ability to Manage Change'. Underneath is a 'Group description' text area. At the bottom right of the right panel is a 'Hide from lists' checkbox.

14.8 Sharing Question Sets

To exchange a question set with another user of AQLnet select File and Export question set. The question set is written to installation folder ReviewDataFiles or be emailed immediately by clicking



To add a question set use File/Import question set and point to received data file.

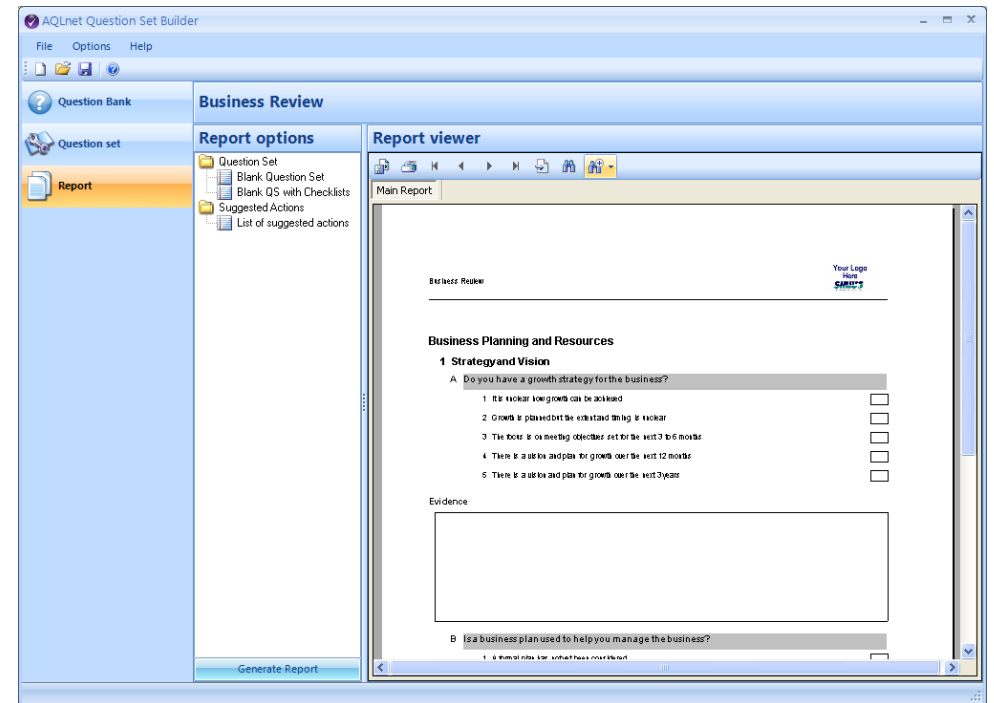


The 'Export question set' dialog box has a title bar with a checkmark icon and a close button. It features a 'Question set' list box with the following items: Business Development Review (highlighted in orange), Business Review, D4S Business Review, D4S Capability and Alignment Review, D4S Recessionary Market Audit, Issues Only, Leadership, and Quality Audit. At the bottom, there are three buttons: 'Cancel', 'Export', and 'Export and email'.

14.9 Question Set Reports

Available reports are shown in the Report options panel. Click the folder icon to display the list of reports.

For print options see section 9.1



Part III: Integration with AQL Reporting Services

15. AQL Reporting Service

AQL Reporting Service is a web application that brings together the data for all AQLnet users working with a single agency. The data is held in a central database accessible through a web browser. The data held here may be used to monitor diagnostic activity, identify service quality issues and to gain strategic insights to client needs and priorities. The key features of the AQL Reporting Service are;

1. Intuitive web interface for accessing information stored on a SQL database anywhere, any time.
2. Backup for Adviser QL users. Individual logins and tiered access provides users with a suite of reports tailored to their needs.
3. Fast turn around on report modifications, ad hoc and new requirements.

15.1 AQL RS Setup

The AQL Reporting Service database and web interface is set up for the user organisation by Sirius Concepts Ltd. The url and login details will be supplied by the local administration. To enable the exchange of data between AQLnet and AQL RS a service tag must be added in the Configuration tab of the Settings option.

The service tag is unique to each user organisation. Once a valid tag has been entered the AQL Reporting Service upload and download options in the File menu bar become active.

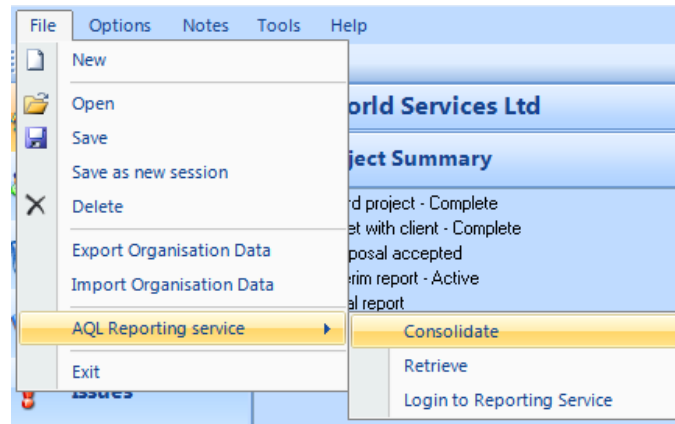
The screenshot shows the 'Settings' window with the 'Configuration' tab selected. The window has a menu bar with 'File' and 'Options'. The 'Configuration' tab contains the following fields and options:

- User ID:** 18002 (with a 'Change' button)
- Database Type:** Access (dropdown menu)
- Database location:** C:\Sirius Concepts\AQLnet\Database\lrm\assess.mdb (with a 'Browse' button)
- Datafile directory:** C:\Sirius Concepts\AQLnet\Database\D4S (with a 'Browse' button)
- Completed reports directory:** .\CompletedReports\ (with a 'Browse' button)
- AQL reporting service tag:** libnettag
- Default review:** Business Review (dropdown menu)
- Default project:** Standard project (dropdown menu)
- ☒ Show Question set builder option on sidebar

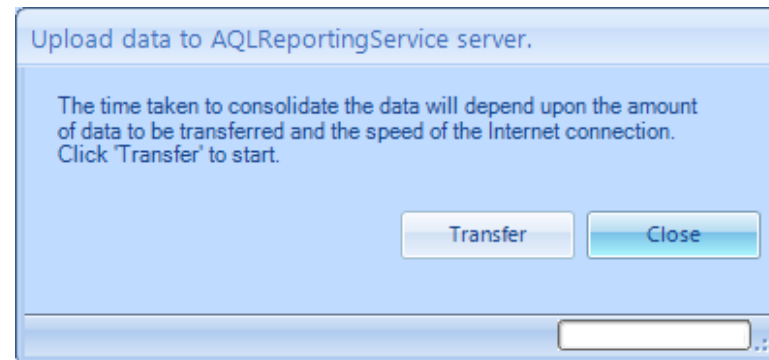
At the bottom right, there are 'Cancel' and 'Save and exit' buttons.

15.1 Unloading to AQL RS

From the menu bar select

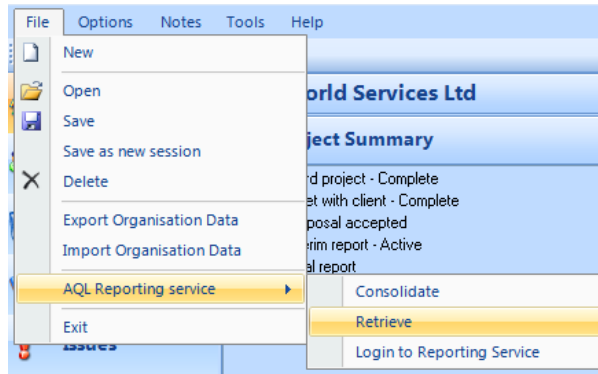


The transfer window is displayed, click **Transfer** to upload data. Only data that has changed since the last upload is transferred. Data held in the AQL: Reporting Service is in read only mode. Any changes must be made through AQLnet and will only appear in AQL RS after the next upload.

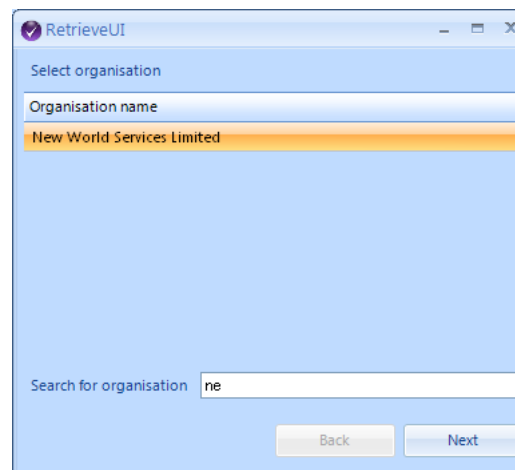


15.2 Downloading from AQL RS

From the menu bar select

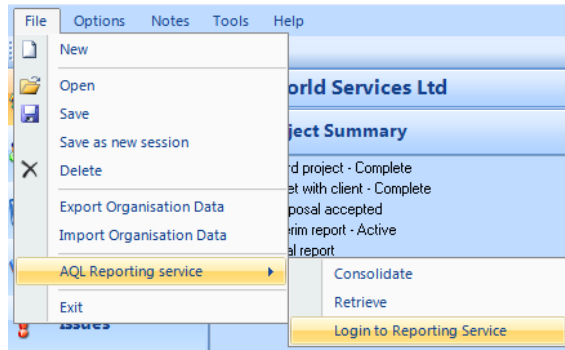


The transfer window is displayed. From the drop down select the review required, a list of organisation held in the Reporting service is displayed. Alternatively an organisation can be directly searched for using the search box. Select the organisation to be retrieved and click [Next](#) then [Download](#)



15.2 Login to AQL Report Services

From the menu bar select



If you have access right to AQL Reporting Services select the option from the menu bar and enter your user name and password.

A screenshot of the 'AQL Reporting Services' login window. The window has a title bar with a checkmark icon and the text 'AQL Reporting Services'. Inside the window, there is a 'Log In' dialog box. The dialog box has a title bar 'Log In' and two input fields: 'User Name:' and 'Password:'. Below the input fields is a 'Log In' button.